



2012 - 2017 Comprehensive Economic Development Strategy for the Central Midlands Region

FAIRFIELD • NEWBERRY • RICHLAND • LEXINGTON



Adopted by the CMCOG Board on June 28, 2012

2012-2017
Comprehensive Economic
Development Strategy for the
Central Midlands Region



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Central Midlands Council of Governments
Board of Directors
on June 28, 2012.

About Central Midlands Council of Governments (CMCOG)

Created in 1969, CMCOG is a regional planning organization, which provides a forum in which local officials can work to resolve issues that transcend their own political boundaries. CMCOG currently consists of 14 member governments and serves in excess of 680,000 people in four midlands counties of Fairfield, Newberry, Richland and Lexington.

CMCOG works to develop area-wide plans and programs for addressing a wide range of issues that collectively affect local governments such as: regional urban & rural transportation planning; environmental and land use planning; community and economic development; workforce development; and aging services. CMCOG Staff also provides a wide variety of research, planning and technical assistance to local governments, writes and administers a variety of grants, and serves as the Area Agency on Aging/ Aging & Disability Resource Center and the Long Term Care Ombudsman for the Central Midlands region.

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INTRODUCTION

The economic recession of 2007-2009 dramatically changed the trajectory of the United States and the global economy. The subprime mortgage crisis led to the collapse of the United States housing bubble. Falling housing-related assets contributed to a global financial crisis, even as oil and food prices soared. The crisis led to the failure or collapse of many of the United States' largest financial institutions: Bear Stearns, Fannie Mae, Freddie Mac, Lehman Brothers and AIG, as well as a crisis in the automobile industry. The Federal government responded with a \$700 billion bank bailout and \$787 billion fiscal stimulus package.

The recession prompted regions everywhere to reassess their strengths, weaknesses, opportunities and challenges. While the Central Midlands Council of Governments (CMCOG) region escaped the worst of the housing downturn and ensuing financial crisis, the recession did impact the local economy in important ways that will have lasting impacts on economic and workforce development. The purpose of this Comprehensive Economic Development Strategy (CEDS) is to provide the region with a current roadmap that accounts for those changes and provides a way forward for succeeding in the new global economy.

This CEDS is also intended to adhere to the requirements that must be met to qualify for assistance from the U.S. Department of Commerce's Economic Development Administration (EDA). The Economic Development Administration Reauthorization Act of 2004, a comprehensive amendment to the Public Works and Economic Development Act of 1965, as amended (PWEDA), requires a CEDS to qualify for financial assistance under EDA's various programs, such as public works, economic adjustment, and planning. This CEDS will help the region compete for this critical funding for economic development projects.

WHAT IS THE CEDS?

The CEDS is designed to bring together the public and private sectors in the creation of an economic roadmap to diversify and strengthen regional economies. The CEDS should analyze the regional economy and serve as a guide for establishing regional goals and objectives, developing and implementing a regional plan of action, and identifying investment priorities and funding sources. A CEDS integrates a region's human and physical capital planning in the service of economic development. Integrated economic planning provides the flexibility to adapt to global economic conditions and fully utilize the region's advantages to maximize economic opportunity for its residents by attracting the private investment that creates jobs for the region's residents.

A CEDS is also the result of a continuing economic development planning process developed with broad-based and diverse public and private sector participation, and sets forth goals and objectives to address the economic development challenges of the region and define the metrics of success.

Finally, a CEDS provides a useful benchmark by which a regional economy can evaluate and compare its opportunities with other regions in the national economy. This process will help create jobs, foster more stable and diversified economies, and improve living conditions. It provides a mechanism for coordinating the efforts of individuals, organizations, local governments, and private industry concerned with economic development.



The EDA emphasizes that the CEDS is a planning process, not only a report to be produced every five years to meet funding requirements. The key to an effective CEDS is a participatory planning process with input and direction from the CEDS Committee members and many other partners. The planning process has been initiated by the Central Midlands Council of Governments but includes involvement from both public and private sectors of the economy.

PUBLIC AND PRIVATE SECTOR PARTICIPATION

CEDS Committee

Working in collaboration with the CMCOG Board of Directors, the Committee for this CEDS was established in October 2011. The CEDS Committee consists of representatives from both private and public sector organizations. The Committee met four times during the planning process beginning in October 2011 and continuing through the last meeting in May 2012.

In addition to the CEDS Committee, a detailed survey on economic development issues was distributed through the CMCOG website to gain additional input from the community (Appendix B). The survey was distributed to local governments, businesses, community organizations, and many others. The results of the survey were used to help the Committee develop the strengths, weaknesses, opportunities and threats included in the CEDS.

At the first meeting on October 18th, the CEDS Committee was introduced to the process of preparing a CEDS document, its contents, its requirements for public input, the timeline for completion of the CEDS and role of Committee members. The economic development survey was also distributed and Committee members were strongly encouraged to distribute the survey's website address to all of their contacts.

The second CEDS Committee meeting on January 19, 2012 was devoted to reviewing the results of the economic development survey to date. Committee members were presented with a summary of the responses and discussed their opinions on how various topics ranked in the survey results.

At the third meeting on April 19, 2012, the draft CEDS document was distributed to the Committee. Specific discussion at the meeting was devoted to discussing the CEDS vision statement, goals, objectives and performance measures. The Committee was asked to review the CEDS draft in full and to submit comments to staff or bring their comments to the May 23, 2012 meeting.

At its last meeting on May 23, 2012, the Committee provided staff with comments and suggestions on the draft CEDS. Staff thanked the Committee for their participation and suggestions and informed the group that they would each receive a copy of the final CEDS.

CMCOG Regional Planning Committee

To obtain further input and suggestions on the CEDS, CMCOG staff also consulted with the CMCOG Regional Planning Committee. This Committee is made up of several CMCOG Board of Directors members who are selected from a broad cross-section of public and private sector representatives. Prior to their May 3, 2012 meeting, staff provided the Committee with the draft CEDS document for their review. At the May 3, 2012 meeting the Committee discussed their suggestions and recommended that the CEDS be presented to the CMCOG Board for approval. Staff thanked the Committee for their participation and suggestions and informed the group that they would each receive a copy of the final CEDS.

CMCOG Board of Directors

Staff presented the draft CEDS to the CMCOG Board of Directors at their May 24, 2012 meeting. The Committee was asked to review the CEDS draft in full and to bring comments and suggestions to their June 28, 2012 meeting. The CMCOG Board of Directors met at their regularly scheduled and noticed meeting on June 28, 2012, to review and approve the CEDS. The Board voted to recommend the CEDS be forwarded to EDA for certification.

Public Comment

On April 19, 2012, notification of the availability of the draft CEDS for public comment was posted at CMCOG and on the CMCOG website (Appendix C). The notice was posted for thirty-two days (April 19 – May 21). All comments received from the public, CEDS Committee, CMCOG Regional Planning Committee and the CMCOG Board of Directors were reviewed and evaluated by staff to determine their suitability for inclusion in the final CEDS document.

The CEDS Committee is made up of the following members:

Member	Agency / Company	Sector Represented
Scott Adams	Prysmian Cables and Systems	Private
Lee Bussell	Chernoff Newman	Private
Barry Butler	Midlands Workforce Dev.Board	Workforce Development
Mike Briggs	Central SC Alliance	Public/Private
Earl Brown	U.S. Representative Joe Wilson	Individual
James Coleman	Wateree Community Action	Community Leader
Donna DeWitt	AFL-CIO	Labor
Rich Fletcher	SCANA	Private
Jeff Griffin	Mashburn Construction	Private
Tiffany Harrison	Fairfield County Economic Develop.	Public/Private
Chad Hardaway	University of South Carolina	Higher Education
Sarah Jaynes	Lexington County Economic Develop.	Public/Private
Jimmy Jones	Christ Central Ministries	Community Leader
Sandra Johnson	Upper Savannah Workforce Dev. Board	Workforce Development
Barrie Kirk	Midlands Technical College	Higher Education
Nelson Lindsay	Richland County Economic Develop.	Public/Private
John Lumpkin	Attorney at Law	Private
Reggie Murphy	Asset Realty	Private
Cathy Novinger	Palmetto AgriBusiness Council	Private
Kathy Olson	United Way	Community Leader
Harry Plexico	Intertape Polymer Group	Private
Teresa Powers	Newberry County Economic Develop.	Public/Private

The CMCOG Board is made up of the following representatives:

CMCOG 2011-2012 Board of Directors		
Ms. Vina Abrams Chair		Mr. John Hardee Vice-Chair
The Hon. Jimmy Bales Member	The Hon. William Banning Member	The Hon. Steve Benjamin Member
The Hon. David Brown Member	The Hon. Boyd Brown Member	Mr. John Carrigg Member
Ms. Ellen Cooper Member	Mr. Stephen Corboy Member	Mr. Kendall Corley Member
The Hon. Todd Cullum Member	The Hon. George Davis Member	The Hon. Sam Davis Member
The Hon. Joyce Dickerson Member	Mr. Clabie Edmond Member	The Hon. David Ferguson Member
The Hon. Dr. Roger Gaddy Member	The Hon. Zebbie Goudelock Member	The Hon. T. Randall Halfacre Member
Mr. L. Hodge Harmon Member	Mr. W.L. Harriford Member	Dr. Clarence Hill Member
The Hon. Valerie Hutchinson Member	Ms. Moryah Jackson Member	The Hon. Norman Jackson Member
The Hon. Johnny Jeffcoat Member	Mr. Wilber Jeffcoat Member	The Hon. Gwen Kennedy Marriage
The Hon. Jim Kinard Member	The Hon. John Knotts Member	The Hon. Paul Livingston Member
Mr. Earl McLeod Member	The Hon. Walton McLeod Member	Mr. Joe Mergo Member
The Hon. Brian Newman Member	Ms. Cathy Novinger Member	The Hon. Todd O'Dell Member
The Hon. Joseph Owens Member	The Hon. Elise Partin Member	The Hon. Dwayne Perry Member
Mr. Milton Pope Member	The Hon. Pat Smith Member	The Hon. Debbie Summers Member
The Hon. William Waldrup Member	The Hon. Kelvin Washington Member	Mr. Mark Williams Member
Ms. Teresa Wilson Member	The Hon. Paul Younginer Member	Mr. John Newman Member (Transportation)
Mr. Derrick Huggins Affiliate Member	Dr. Marshall White Affiliate Member	The Hon. David Busby Advisory Member
The Hon. Lee Faber Advisory Member	The Hon. Charles Haggard Advisory Member	The Hon. Charlene Herring Advisory Member
The Hon. J. Michael Ross Advisory Member	The Hon. Stanley Shealy Advisory Member	The Hon. Richard Thomas Advisory Member
The Hon. Derek Underwood Advisory Member	The Hon. Johnny White Advisory Member	

CMCOG Staff working on the CEDS include the following:

CMCOG CEDS Development Team		
Mr. Norman Whitaker Executive Director		
Mr. George Bistany Community & Economic Development Director	Ms. Cyndi Gawronski Community Development Planner	Mr. Ben Mauldin Operations Director
Ms. Tasha Milhouse Administrative Assistant II	Mr. Greg Sprouse Chief Planner	





2

BACKGROUND INFORMATION

The Central Midlands Council of Governments (CMCOG) is located in the geographical center of the State of South Carolina (Figure 2.1). CMCOG is one of ten (10) State designated planning regions (Figure 2.2). Each planning region has a Council of Government (COG) or similarly named agency that acts as the regional planning organization for that region.

Figures 2.3 through 2.7 display the Central Midlands Region (Fairfield, Lexington, Newberry and Richland). These four counties are physically and socially diverse, but are broadly joined by their shared transportation systems and intertwining economies.

Figure 2.1:
State of South
Carolina



Figure 2.2:
South Carolina's
Ten Planning
Regions

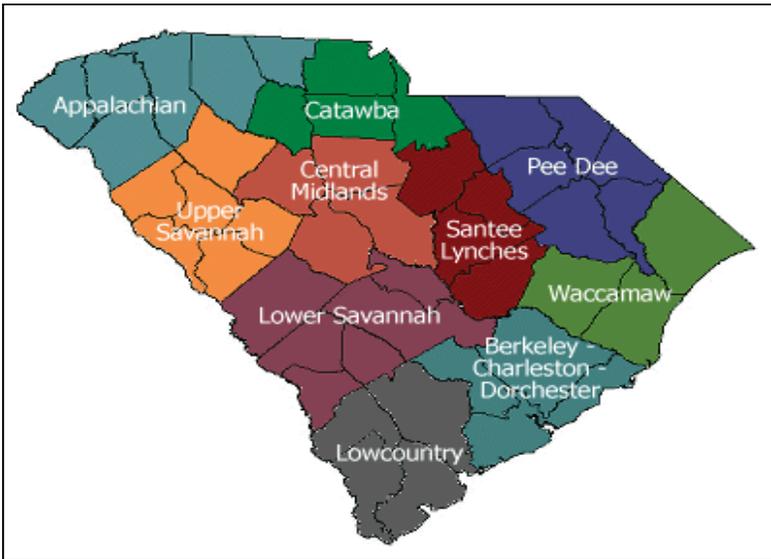
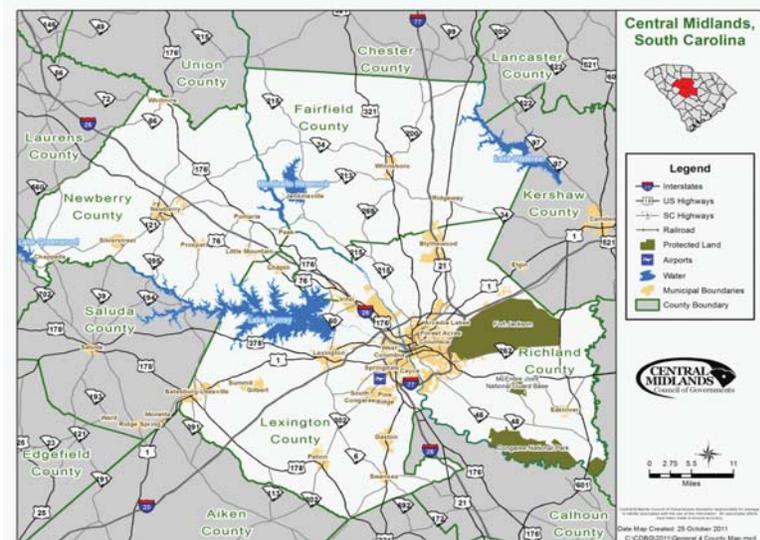


Figure 2.3:
Central Midlands
Counties



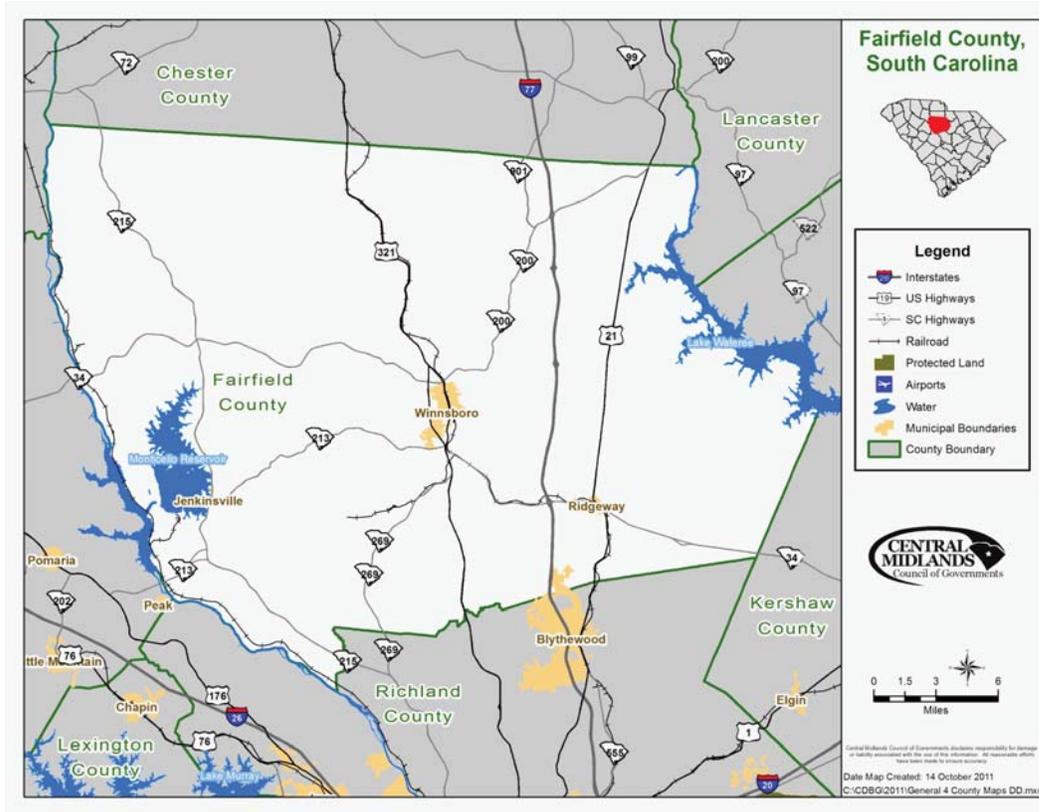


Figure 2.4:
Fairfield County

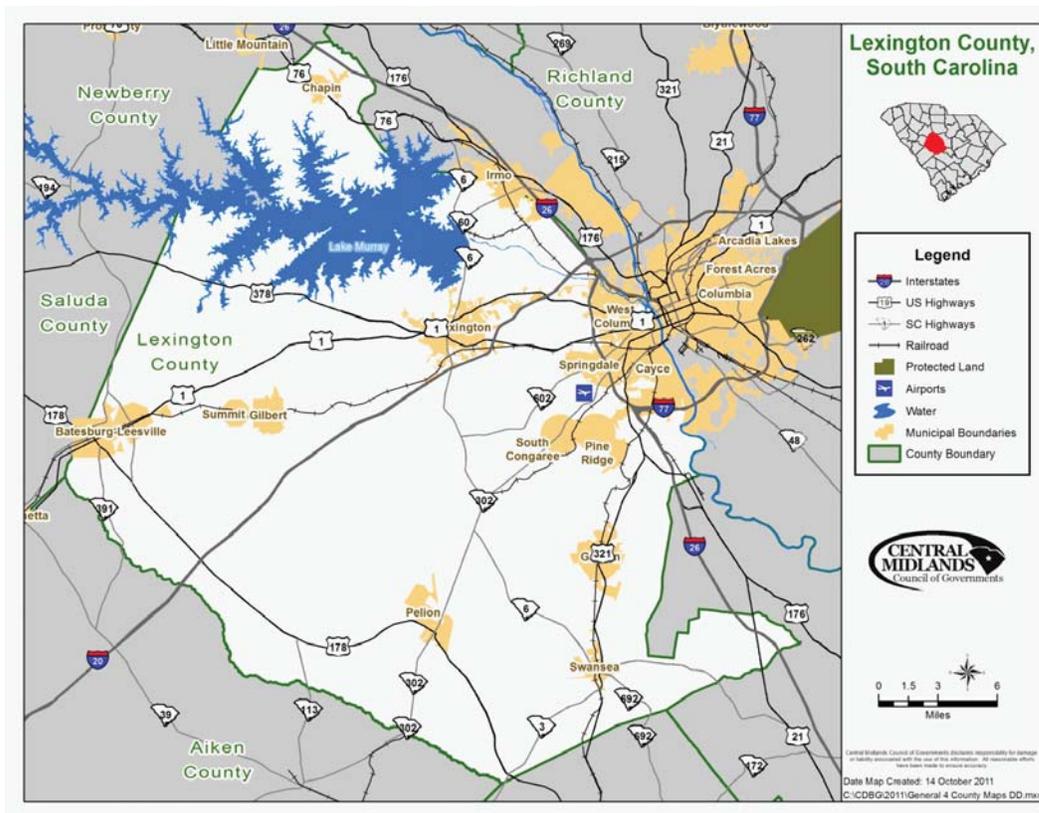


Figure 2.5:
Lexington County

**MEMBERS OF THE CENTRAL MIDLANDS
COUNCIL OF GOVERNMENTS**

FAIRFIELD COUNTY
WWW.FAIRFIELDSC.COM

LEXINGTON COUNTY
WWW.LEX-CO.COM

NEWBERRY COUNTY
WWW.NEWBERRYCOUNTY.NET

RICHLAND COUNTY
WWW.RICHLANDONLINE.COM

TOWN OF BATESBURG-LEESVILLE
WWW.BATESBURG-LEESVILLE.ORG

CITY OF CAYCE
WWW.CITYOFCAYCE-SC.GOV

CITY OF COLUMBIA
WWW.COLUMBIASC.NET

CITY OF FOREST ACRES
WWW.FORESTACRES.NET

TOWN OF IRMO
WWW.TOWNOFIRMOSC.COM

TOWN OF LEXINGTON
WWW.LEXSC.COM

CITY OF NEWBERRY
WWW.CITYOFNEWBERRY.COM

TOWN OF SPRINGDALE
WWW.SPRINGDALESC.COM

CITY OF WEST COLUMBIA
WWW.WESTCOLUMBIASC.GOV

TOWN OF WINNSBORO
WWW.TOWNOFWINNSBORO.COM

HISTORICAL POPULATION

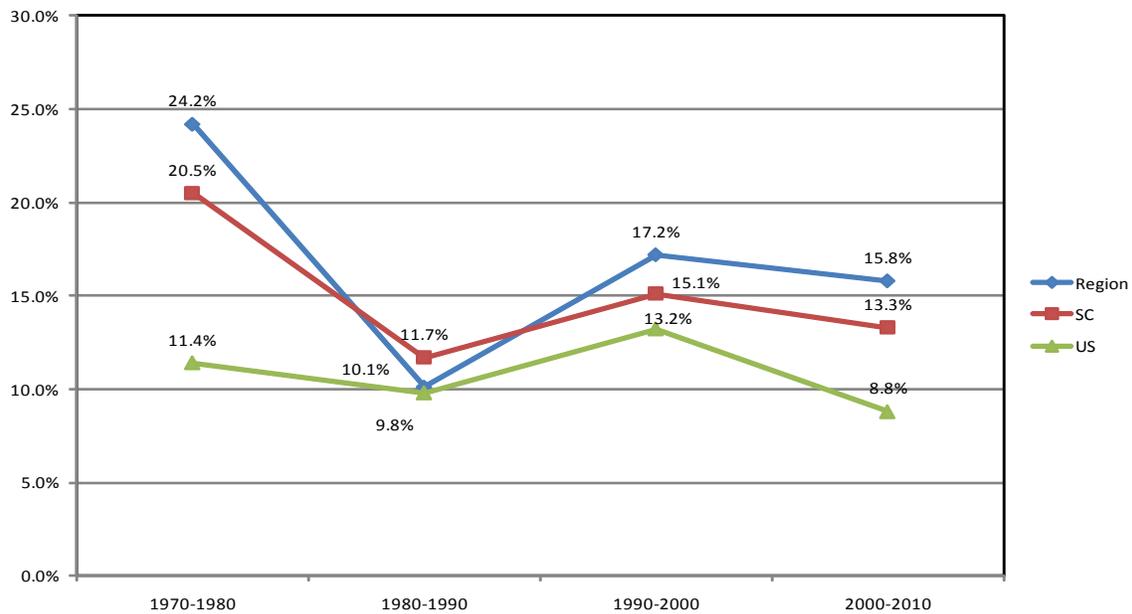
According to data from the South Carolina Office of Research and Statistics, the Central Midlands Region has experienced steady growth over the past 30 years. The population has increased 35% from 462,030 in 1980 to 708,359 in 2010 (Figure 2.8). It is expected that growth in the Region will continue and may well reach 1,000,000 within the next two decades. The rate of growth in the region has been somewhat sporadic with the highest rate occurring between 1970 and 1980 (19.5%) then declining from 1980-1990 and increasing again from 1990-2010 (Figure 2.9).

Figure 2.8:
Historic
Population
Trends

Place	1970	1980	1990	2000	2010
Fairfield	19,999	20,700	22,295	23,454	23,956
Lexington	89,012	140,353	167,611	216,014	262,391
Newberry	29,273	31,242	33,172	36,108	37,508
Richland	233,868	269,735	285,720	320,677	384,504
Region	372,152	462,030	508,798	596,253	708,359
SC	2,590,516	3,121,820	3,486,703	4,012,012	4,625,364
USA	203,302,031	226,545,805	248,709,873	281,421,906	308,745,538

Source: U.S. Census Bureau, Census of the Population 1970-2010

Figure 2.9:
Growth
Rates
1970-2010



Source: U.S. Census Bureau, Census of the Population 1970-2010

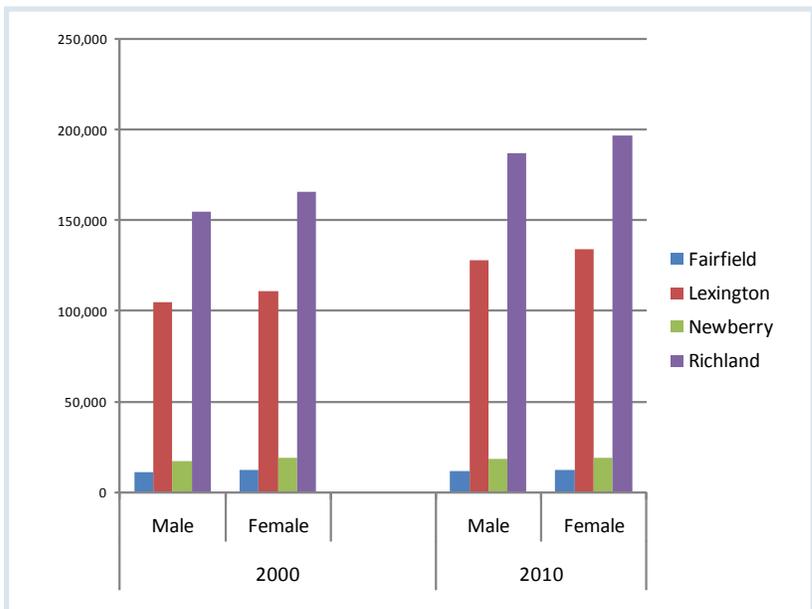


Figure 2.10:
Regional Population by Gender 2000-2010

Source: U.S. Census Bureau, Census of the Population, 2000, 2010

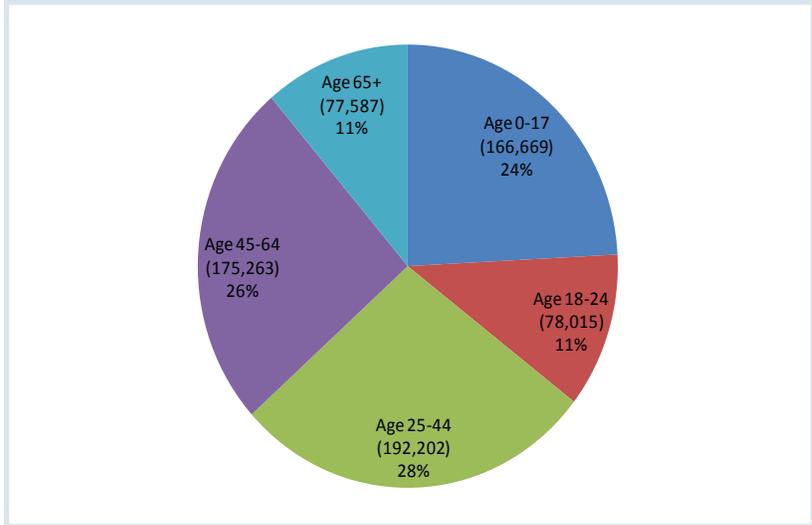


Figure 2.11:
Regional Population by Age

Source: U.S. Census Bureau, Census of the Population, 2000, 2010

GENDERS AND AGES

In a breakdown of the regional population by gender, females are the majority, outnumbering males by approximately 20,000 (Figure 2.10). Over the past 10 years this ratio has remained consistent. The difference between the number of males and females has remained basically the same even as the population continues to increase.

The population structure of the region is generally young considering that the age distribution based on the latest data shows the greatest amount of the population (63%) consists of those under age 44 (Figure 2.11). Contributors to the age distribution percentages may be the result of the University of South Carolina and other colleges/universities in the area, and the Fort Jackson Army base. These institutions bring in large numbers of younger people who may continue to reside in the Central Midlands area after graduation and service. As of 2010, the median age for the region is 38, a small increase from the 2000 median age of 35.6.

Hispanic
Community
Festival in
the Midlands



RACIAL & ETHNIC MAKEUP

The racial makeup of the region is primarily composed of the White race category (57%). The Black race category ranks second at 32%. Both of these population groups have remained consistent in their total percentages and population increases from 2000 to 2010 (Figure 2.12).

Hispanics have increased dramatically in the region since 2000 (Figure 2.13). In 2000, there were approximately 14,642 Hispanics in the four county region. In 2010, this number rose to over 36,230, an increase of 147%. This increase reflects similar growth among the Hispanic population throughout the southern United States.

Figure 2.12:
Regional
Population
by Race

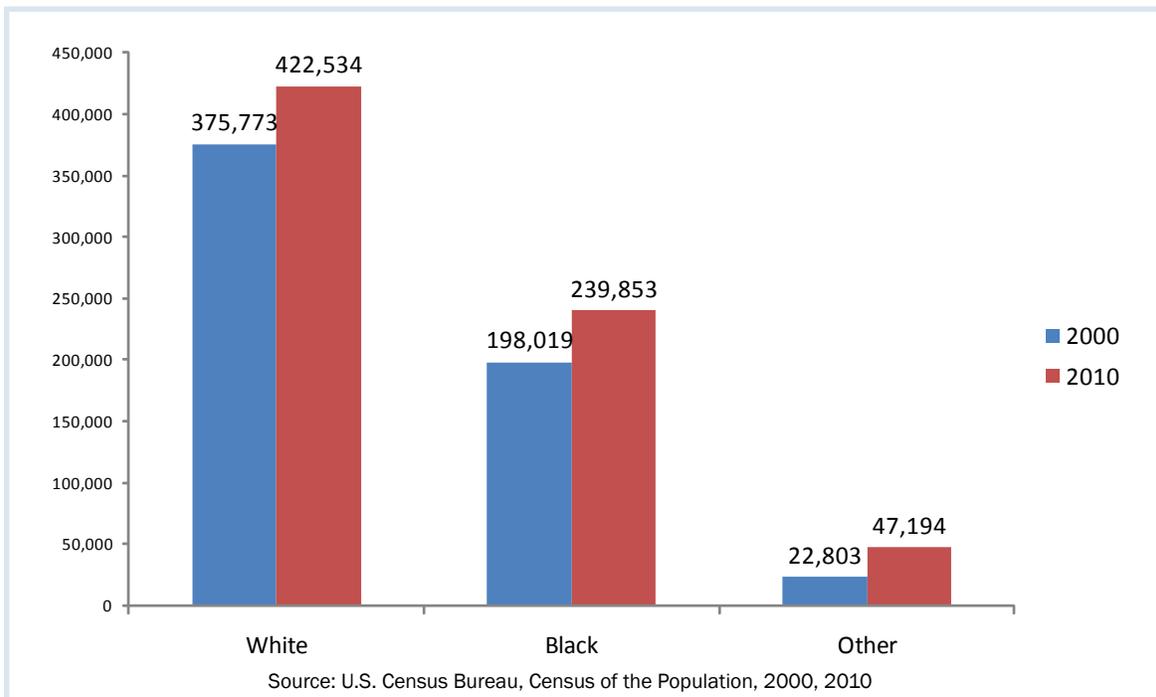
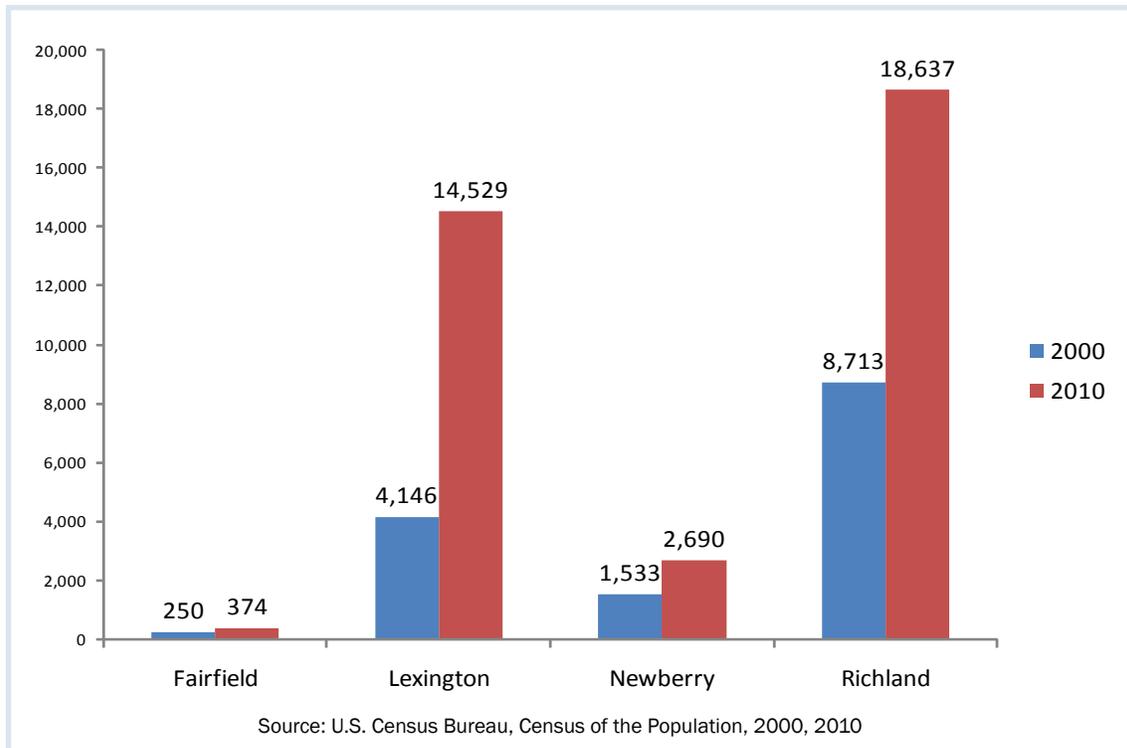


Figure 2.13:
Growth in
Hispanic
Population



PROJECTED POPULATION

The South Carolina Budget and Control Board projects that the population of the region will experience an almost 20% increase by 2035 (Figure 2.14). While this increase overall is significant to note, when broken out by County, the population increases are projected to occur mainly in the two urban counties, Lexington and Richland while growth remains small in the two rural counties, Fairfield and Newberry (Figure 2.15).

Population growth in the region can be attributed to a number of factors including:

- Favorable year-round climate
- Wealth of available land for both residential and commercial development
- Lower land and home prices than in other parts of the Southeast
- Comparatively low cost of living
- Desirable quality of life
- Lower tax and business costs
- Good interstate connectivity
- Diversification of industry in new industrial fields (e.g., automobile components, telecommunications, banking, computers and other hi-tech sectors of the economy) and
- University of South Carolina, a major research university

Figure 2.14:
Regional
Population
Projection
2010-2035

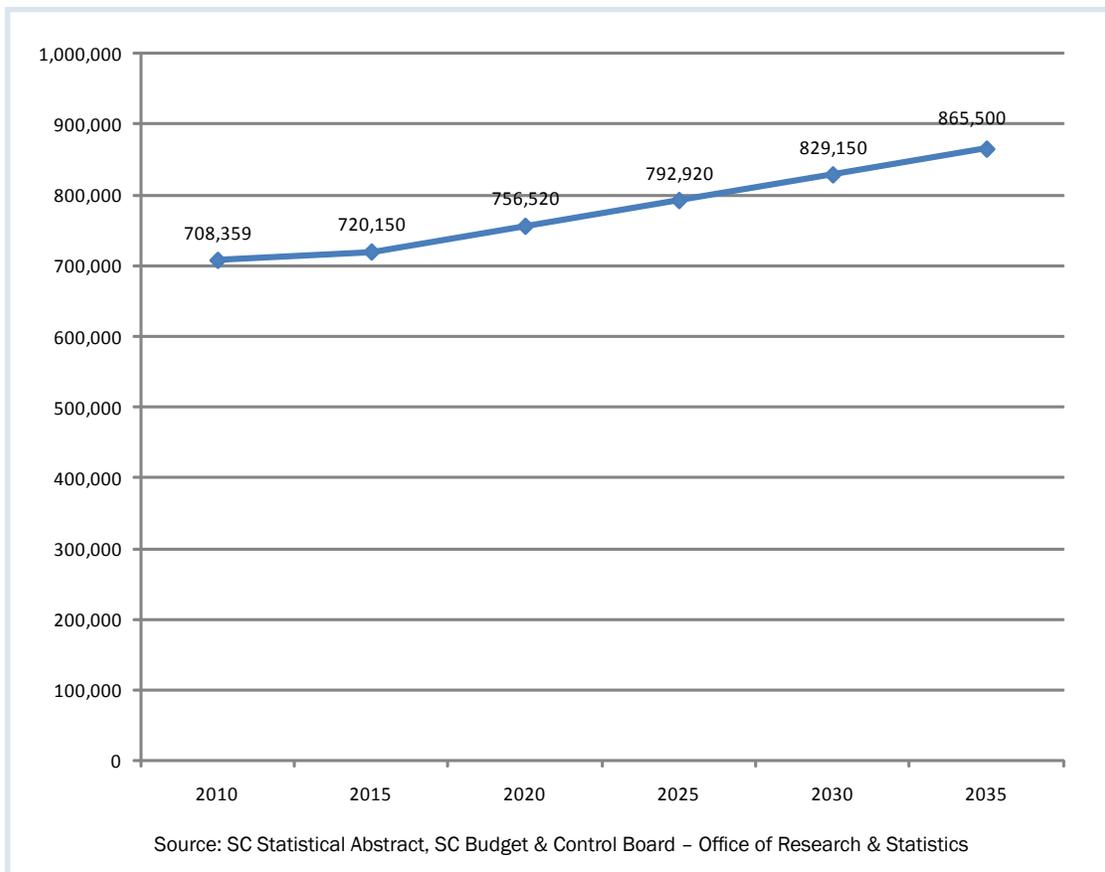
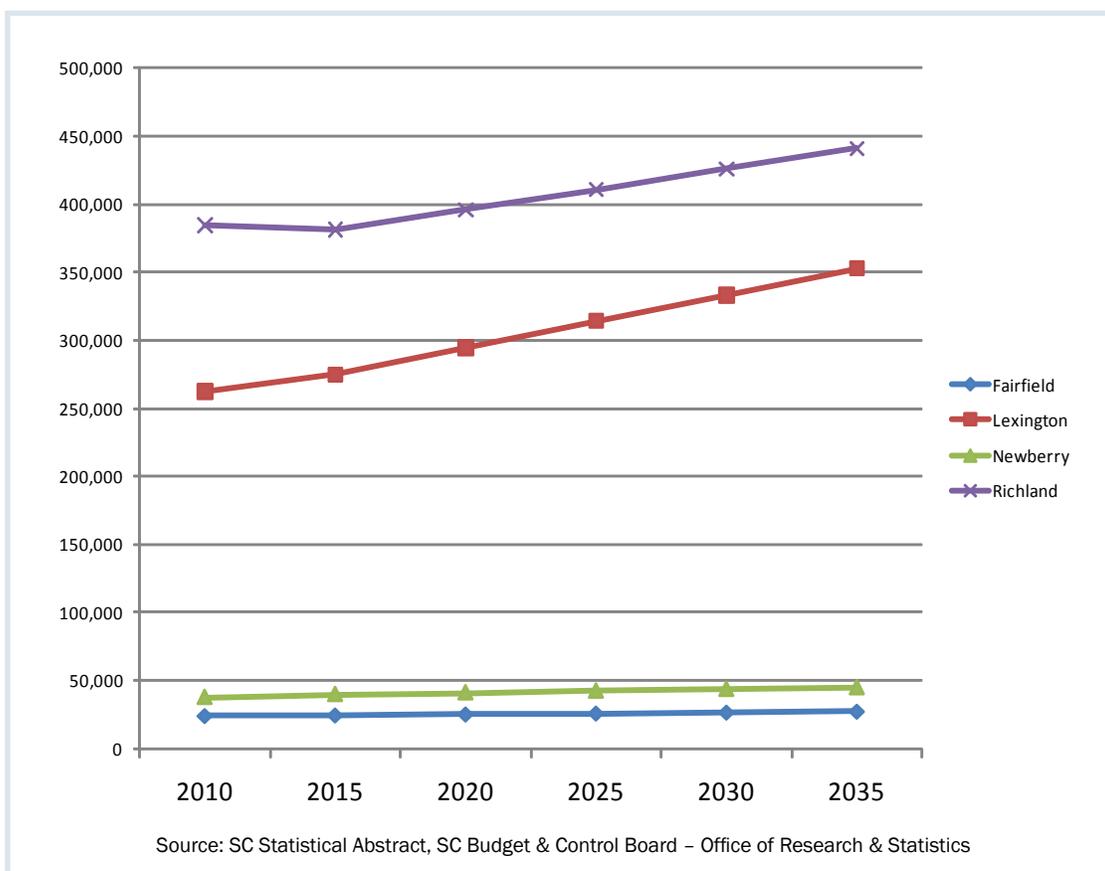


Figure 2.15:
Regional
Population
Projection by
County
2010-2035



COUNTY PROFILES

The following four pages provide individual profiles for each County in the Central Midlands region.

Fairfield County Profile

Area Information

County Seat	Winnsboro	County Population Ranking	38
Land Area	686.28 sq. miles	Average Annual Precipitation	45.84 in
Total Population (2010)	23,956	Population Change (2000-2010)	+2%
Median Household Income (2009)	\$32,694	Median Age	42.4

Labor Force & Income

Based on the latest data from the U.S. Bureau of Labor Statistics 9,564 people are employed and 339 firms are operating in Fairfield County. The unemployment rate was 13.3 percent, as of February 2012 up from a rate of 12.4 percent in 2011. For the third quarter of 2011, the average weekly wage was \$892, an increase of 7 percent from the \$831 average for all of 2010.

Industry	Employees	Employers	Avg. Weekly Wage
Natural Resources & Mining	50	15	\$593
Construction	103	26	\$883
Manufacturing	1280	20	\$951
Trade, Transportation & Util.	1931	93	\$1,119
Financial Activities	51	20	\$607
Professional & Business Services	548	36	\$1,844
Education & Health Services	724	27	\$503
Leisure & Hospitality	271	23	\$229
Other Services	86	34	\$413
Public Administration	1,625	44	\$725

Education

According to the latest Census data, 5,873 people in Fairfield County are enrolled in school. Countywide, 66.9 percent have a high school diploma or higher and 11.6 percent have a bachelor's degree or higher.

Percent of population three years and over enrolled in school by level of education:

Pre-K/Kindergarten	11%	Elementary School	52%
High School	28%	College/Grad School	11%

Fiscal Information

Total Revenues FY09	\$28,993,062	Per Capita Revenues FY 09	\$1,236
Total Expenditures FY 09	\$25,583,035	Per Capita Expenditures FY 09	\$1,091
General Fund Budget FY 11	\$23,148,835	Per Capita Gen. Fund Budget FY 11	\$987
Total Debt Outstanding FY 09	\$8,240,000	Credit Rating FY 09 (Moody's)	Baa1

Top Employers

V.C. Summer Nuclear Station	Performance Fibers Operations
Fairfield County School District	Sargent & Lundy
Fairfield County Government	Isola
Fairfield Healthcare Center	Shaw Constructors
Fairfield Memorial Hospital	Stone & Webster Services
Fluor Daniel, Inc.	Ben Arnold-Sunbelt Beverage
Guardian Fiberglass Corp.	Wackennut Corporation
Heritage Healthcare of Ridgeway	Town of Winnsboro
Lang Mekra North America	United Hospice, Inc.

Lexington County Profile

Area Information

County Seat	Lexington	County Population Ranking	6
Land Area	699 sq. Miles	Average Annual Precipitation	49.1 in.
Total Population (2010)	262,391	Population Change (2000-2010)	+21%
Median Household Income (2009)	\$52,062	Median Age	37.9

Labor Force & Income

Based on the latest data from the U.S. Bureau of Labor Statistics 124,562 people are employed and 5,644 firms are operating in Lexington County. The unemployment rate was 7.3 percent as of February 2012, slightly down from a rate of 7.8 percent in 2011. For the third quarter of 2011, the average weekly wage was \$700, an increase of 5 percent from the \$664 average for all of 2010.

Industry	Employees	Employers	Avg. Weekly Wage
Natural Resources & Mining	915	34	\$641
Construction	5,482	734	\$724
Manufacturing	10,197	235	\$898
Trade, Transportation & Util.	23,225	1,424	\$635
Financial Activities	4,194	540	\$794
Professional & Business Services	8,871	876	\$695
Education & Health Services	9,094	475	\$637
Leisure & Hospitality	11,036	557	\$261
Other Services	2,958	552	\$528
Public Administration	18,215	157	\$898

Education

According to the latest Census data, 55,402 people in Lexington County are enrolled in school. Countywide, 94.8 percent have a high school diploma or higher and 24.6 percent have a bachelor's degree or higher.

Percent of population three years and over enrolled in school by level of education:

Pre-K/Kindergarten	14%	Elementary School	47%
High School	23%	College/Grad School	19%

Fiscal Information

Total Revenues FY09	\$165,027,254	Per Capita Revenues FY 09	\$764
Total Expenditures FY 09	\$134,897,499	Per Capita Expenditures FY 09	\$624
General Fund Budget FY 11	\$98,127,239	Per Capita Gen. Fund Budget FY 11	\$454
Total Debt Outstanding FY 09	\$42,193,790	Credit Rating FY 09 (S & P)	AA-

Top Employers

Babcock Center	Lowes Home Centers
Bi-Lo	Michelin North America
Brandi, Inc.	Midlands Technical College
Food Lion	NCR Corporation
House of Raeford Farms	Southeastern Freight Lines
Lexington County Government	Teleperformance USA
Lexington County Health Service District	United Parcel Service
Lexington County School Districts	Wal-Mart
Lexington Medical Center	

Newberry County Profile

Area Information

County Seat	Newberry	County Population Ranking	27
Land Area	631 sq. Miles	Average Annual Precipitation	49.33 in.
Total Population (2010)	37,508	Population Change (2000-2010)	+4%
Median Household Income (2009)	\$37,263	Median Age	39.9

Labor Force & Income

Based on the latest data from the U.S. Bureau of Labor Statistics 16,648 people are employed and 727 firms are operating in Newberry County. The unemployment rate was 9.1 percent as of February 2012, down from a rate of 9.9 percent in 2011. For the third quarter of 2011, the average weekly wage was \$627, an increase of 4.6 percent from the \$599 average for all of 2010.

Industry	Employees	Employers	Avg. Weekly Wage
Natural Resources & Mining	0	0	N/A
Construction	583	66	\$671
Manufacturing	4,934	48	\$711
Trade, Transportation & Util.	1,916	190	\$486
Financial Activities	195	56	\$597
Professional & Business Services	554	76	\$436
Education & Health Services	1,136	52	\$507
Leisure & Hospitality	809	58	\$240
Other Services	237	64	\$432
Public Administration	2,412	68	\$765

Education

According to the latest Census data, 8,802 people in Newberry County are enrolled in school. Countywide, 69.2 percent have a high school diploma or higher and 14.9 percent have a bachelor's degree or higher.

Percent of population three years and over enrolled in school by level of education:

Pre-K/Kindergarten	13%	Elementary School	46%
High School	25%	College/Grad School	18%

Fiscal Information

Total Revenues FY09	\$32,313,892	Per Capita Revenues FY 09	\$895
Total Expenditures FY 09	\$25,583,181	Per Capita Expenditures FY 09	\$709
General Fund Budget FY 11	\$20,756,855	Per Capita Gen. Fund Budget FY 11	\$575
Total Debt Outstanding FY 09	\$11,941,751	Credit Rating FY 09	Moody's A3 S & P A

Top Employers

Company	Caterpillar, Inc.	Company	McDonalds
	City of Newberry		Newberry College
	Newberry County		Newberry County Memorial Hospital
	Georgia Pacific Wood Products		Newberry Disabilities and Special Needs
	ISE Newberry, Inc.		Pioneer Frozen Foods South Carolina
	JF Hawkins Nursing Home		Roper Personnel Services
	Komatsu America Corporation		Newberry County School District
	Kraft Foods North America		Trucast, Inc.

Richland County Profile

Area Information

County Seat	Columbia	County Population Ranking	2
Land Area	756 sq. miles	Average Annual Precipitation	50 inches
Total Population (2010)	384,504	Population Change (2000-2010)	+20%
Median Household Income (2009)	\$45,643	Median Age	32.6

Labor Force & Income

Based on the latest data from the U.S. Bureau of Labor Statistics 167,385 people are employed and 8,921 firms are operating in Newberry County. The unemployment rate was 8.3 percent as of February 2012, down from a rate of 9.2 percent in 2011. For the third quarter of 2011, the average weekly wage was \$700, an increase of 5.4 percent from the \$664 average for all of 2010.

Industry	Employees	Employers	Avg. Weekly Wage
Natural Resources & Mining	524	30	\$709
Construction	5,959	594	\$824
Manufacturing	9,734	250	\$1,078
Trade, Transportation & Util.	30,477	1,974	\$700
Financial Activities	20,311	1,030	\$1,000
Professional & Business Services	27,525	1,808	\$763
Education & Health Services	26,802	915	\$804
Leisure & Hospitality	19,105	827	\$277
Other Services	6,039	950	\$568
Public Administration	51,438	354	\$922

Education

According to the latest Census data, 97,237 people in Richland County are enrolled in school. Countywide, 85.1 percent have a high school diploma or higher and 32.5 percent have a bachelor's degree or higher.

Percent of population three years and over enrolled in school by level of education:

Pre-K/Kindergarten	12%	Elementary School	37%
High School	20%	College/Grad School	33%

Fiscal Information

Total Revenues FY09	\$219,210,334	Per Capita Revenues FY 09	\$684
Total Expenditures FY 09	\$224,330,733	Per Capita Expenditures FY 09	\$700
General Fund Budget FY 11	\$134,823,817	Per Capita Gen. Fund Budget FY 11	\$420
Total Debt Outstanding FY 09	\$102,047,675	Credit Rating FY 09	Moody's S & P Aa3 AA

Top Employers

Company	Blue Cross Blue Shield of SC	Company	Richland County School Districts
	Cellco Partnership		SC Dept. of Transportation
	City of Columbia		SC Dept. of Corrections
	Computer Sciences Corporation		SC Dept. of Health and Human Services
	Department of Defense		SC Dept. of Mental Health
	Palmetto GBA LLC		SCANA
	Palmetto Health		Sisters of Charity Providence Hospital
Richland County	SC Dept. of Social Services		

CONCLUSION

The demographic summaries described in this section help bring to light some important characteristics of the region. Overall, the region has a fairly young population and will continue to grow, particularly in Lexington and Richland Counties. Household income regionally is similar to national averages; however, there are significant differences between Lexington/Richland and Fairfield/Newberry Counties. These differences are also reflected in population projections.



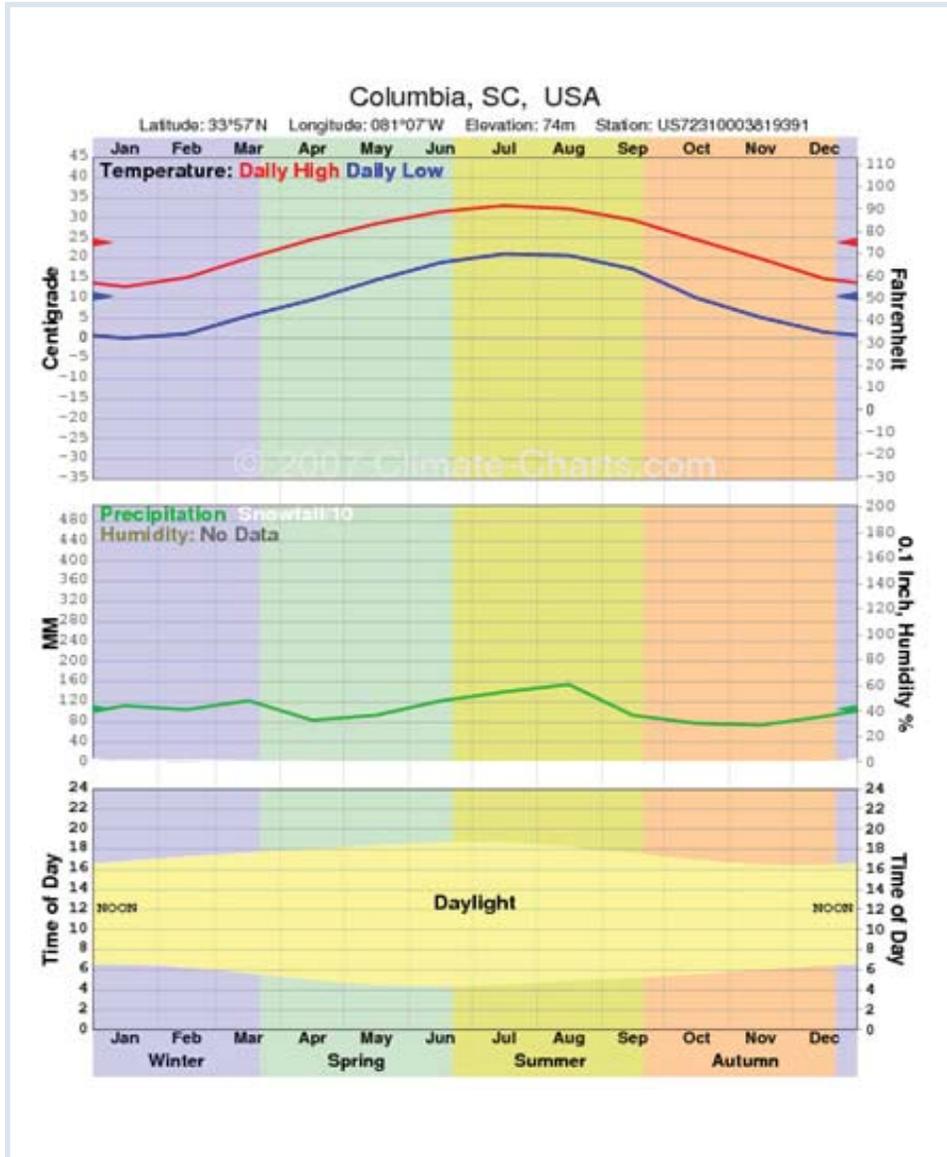


3

NATURAL SYSTEMS

CLIMATE

The Central Midlands region has a humid subtropical climate, with mild winters, warm springs and autumns, and very hot and humid summers. The area averages 56 nights below freezing, but extended cold is rare. Precipitation, at 48.3 inches (1,230 mm) annually, peaks in the summer months, and is the least during spring and fall. Snowfall averages 2.1 inches, but most years receive no snowfall, as the median seasonal amount is 0. Air in the midlands, like other areas of the southeast, is prone to inversions which can trap ozone and other pollutants. Air pollution in the Midlands is emitted from different sources including factories, power plants, dry cleaners and degreasing operations as well as mobile sources such as cars, buses, planes, trucks, and trains.

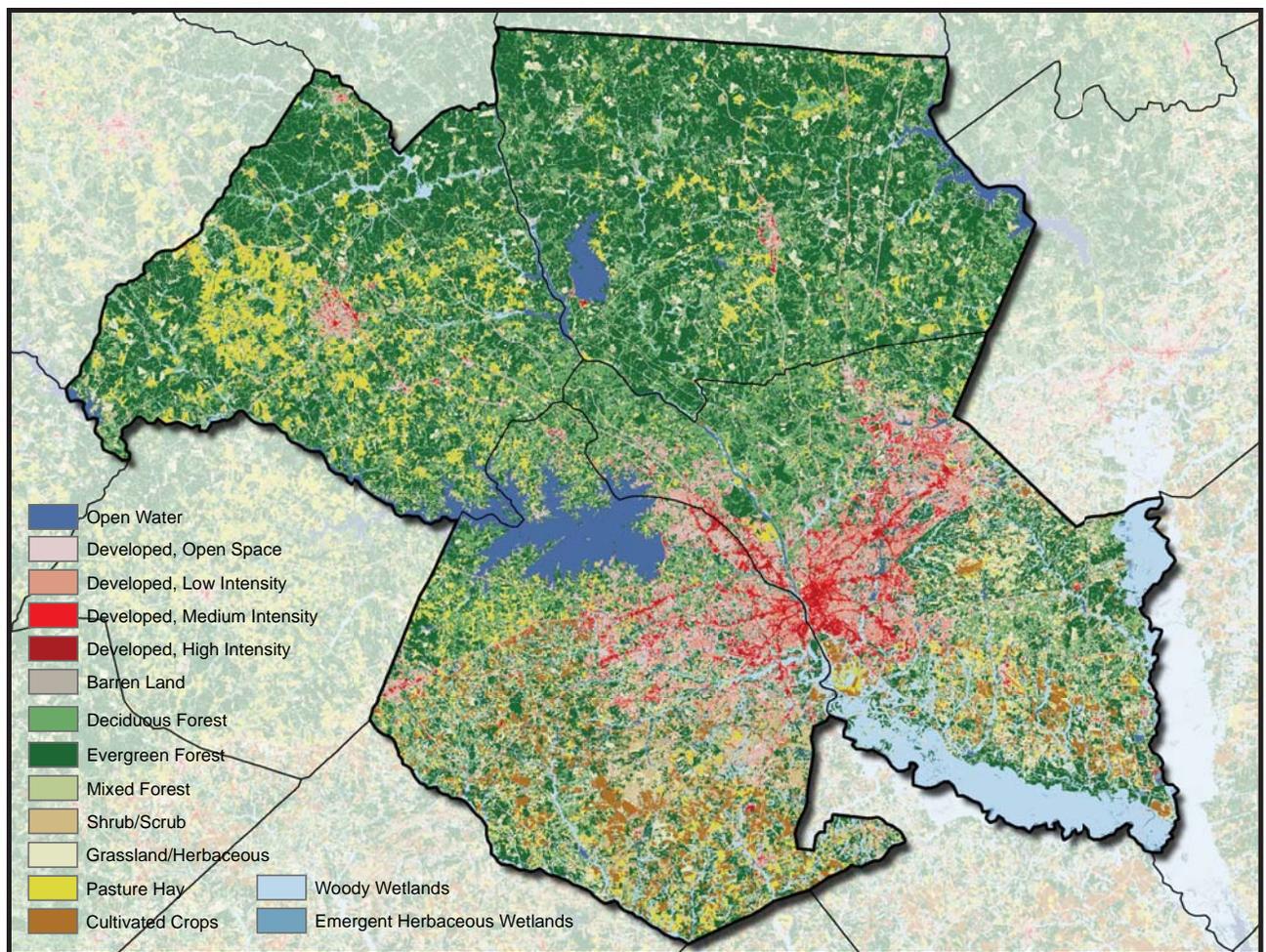


Although the Central Midlands Region is currently designated as being in “attainment” with the National Ambient Air Quality Standards (NAAQS), recent proposals by the EPA to strengthen the 8 hour ozone limits would likely cause the region to fall into “non-attainment” status. Such a change would have significant impacts for both public and private sector stakeholders, such as limitations on federal funding for major road improvement projects and restrictions on new or expanding industries. In addition to these economic impacts, increased air pollution can also contribute to significant public health issues such as respiratory problems, heart disease, lung cancer and premature death.

LAND AREA

The four counties of the Central Midlands Region occupy a total land area of approximately 1,846,000 acres, of which 53% are forested, 22% are agricultural, and 13% are consumed by some type of commercial, residential, or industrial development. The remaining 12% are made up of open water and wetlands. Of the four counties, Fairfield and Newberry have the highest percentage of land in forest, while Richland and Lexington have the highest percentage of developed land. All four counties have significant agricultural areas that contribute to the regional economy with Lexington and Newberry having the highest percentage of cultivated crops and pasture lands. Lexington County has the highest percentage of open water with Lake Murray taking up a large portion of the County, while Richland has the highest percentage of wetlands with the vast Congaree River floodplain that includes Congaree National Park.

Figure 3.1: 2006 Land Cover in the Central Midlands Region



Source: USGS 2006 National Land Cover Database

GEOLOGY

An eco-region is a useful way to classify or describe the unique physical characteristics of a particular place. The U.S. Geological Survey defines an eco-region as “a homogeneous area defined by similarity of climate, landform, soil, potential natural vegetation, hydrology, or other ecologically relevant variable.” By this definition there are five major eco-regions within the state of South Carolina that include the Blue Ridge, Piedmont, Southeaster Plains, Middle Atlantic Coastal Plain and Southern Coastal Plain. Of these five, two are found within the Central Midlands Region: the Piedmont and the South-eastern Plains.

Considered the non-mountainous portion of the old Appalachians Highland, the Piedmont eco-region comprises a transitional area between the mountains of northwest South Carolina and the relatively flat coastal plain in the southern portion of the state. Within the Central Midlands, Newberry and Fairfield Counties lie entirely inside the Piedmont eco-region. The topography of the Piedmont provides for good surface drainage, but internal soil drainage is relatively poor because the soil is compact and clayey in texture. As a result, rainfall does not readily percolate through the soil, and runoff potential is considerable, creating a high risk of erosion.

When poor farming practices, such as clear cutting of trees, overproduction of cotton, and the failure of farmers to use crop rotation and to allow fields to lie fallow, was combined with soil of this type, the result was such severe erosion that by 1940, much Piedmont land was rendered useless for agriculture. The presence of both Sumter National Forest and the extensive commercial forestry in Newberry and Fairfield Counties today trace their roots back to federal and state government efforts to restore the severely eroded land in these counties through the extensive planting of pine and other types of trees.

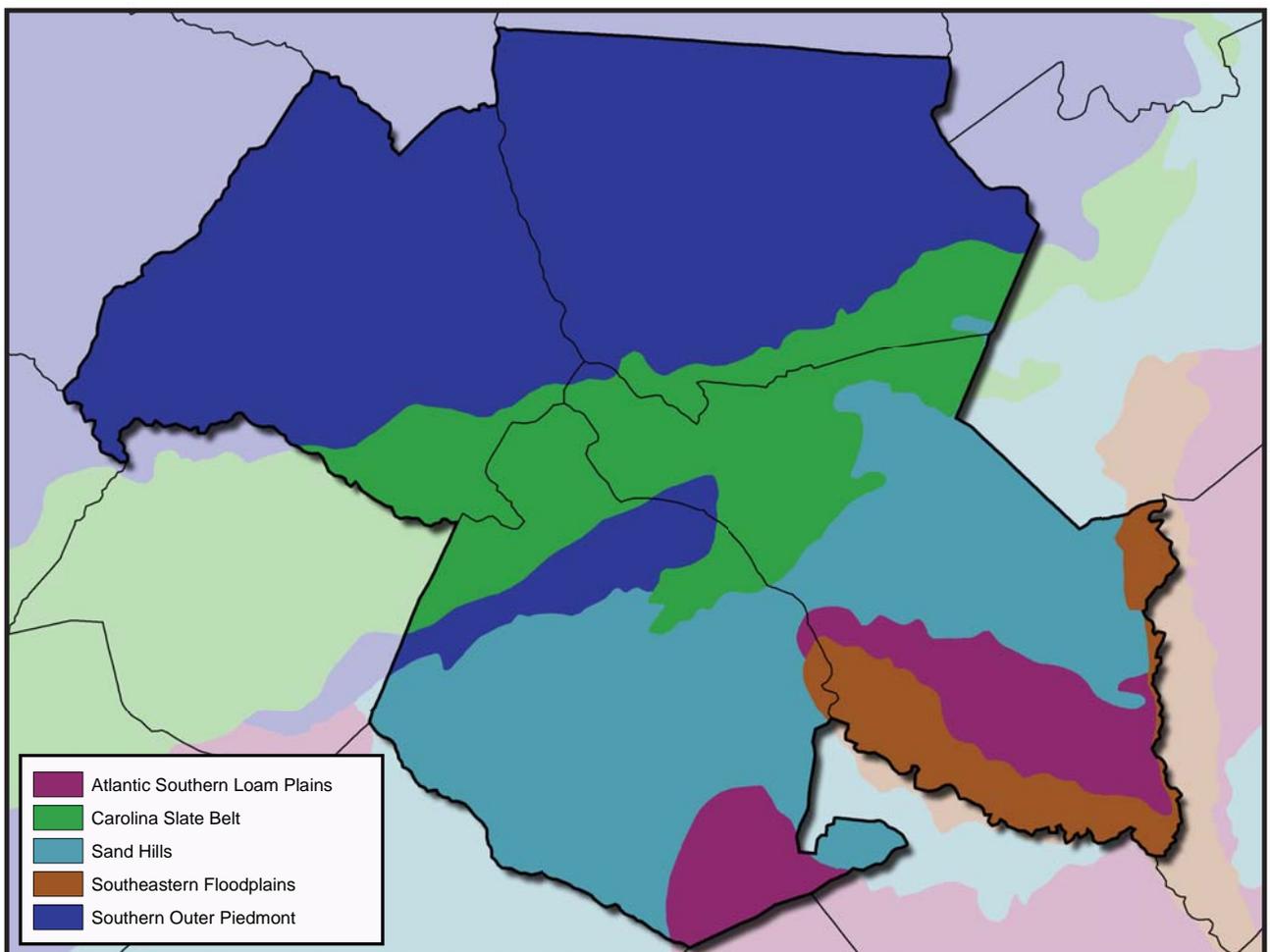
The Central Midlands contains two Piedmont sub-regions: the Southern Outer Piedmont and the Carolina Slate Belt. Over 90% of Newberry and Fairfield counties lie within the Southern Outer Piedmont sub-region, whose landform class consists of mainly irregular plains. Pine trees dominate on old field sites and pine plantations, while mixed oak forest is found in less heavily altered areas. Southern portions of Newberry and Fairfield counties and northern areas of Lexington and Richland counties are part of the Carolina Slate Belt. This sub-region is somewhat less resistant to erosion than other parts of the Piedmont, resulting in lower elevations and wider valleys, which make the area particularly suitable for reservoir sites, such as that of Lake Murray.

The Southeaster plains are irregular, broad inter-stream areas that have a mosaic of cropland, pasture, woodland, and forest. Within the southern portion of the Central Midlands region (Lexington and Richland Counties), there are three sub-categories of the Southeastern Plains: 1) Sand Hills; 2)

Atlantic Southern Loam Plains; and 3) Southeastern Floodplains and Low Terraces. The Sand Hills are “a belt of infertile sandy soil five to fifteen miles wide,” where the “transition between the hard rocks of the Piedmont and the loose, soft sands” of the Southeastern Plains occurs. At this point of transition lies the Fall Line, the place where the sharp drop in elevation from the Piedmont to the Southeastern Plains takes place. The waterfalls created by this drop in elevation were a barrier to upstream river navigation, but also served as a source of power for early manufacturing mills. The confluence of available hydro power and locations where ships’ cargo was loaded and unloaded resulted in many of these sites becoming future southeastern U.S. cities, including Richmond, Virginia; Augusta, Georgia; and Columbia, South Carolina.

The Atlantic Southern Loam Plains sub-region is lower, flatter, more gently rolling, with finer-textured soils than the Sand Hills. It is a major agricultural zone, with deep, well-drained soils. Lower Richland and Lexington counties have long been the Central

Figure 3.2: Eco-Regions of the Central Midlands Region



Midlands' most agriculturally productive area, primarily focused on row crops such as soybeans, cotton, millet and sorghum. The third and final southeastern Plains sub-region within the Central Midlands (mainly Richland County) is the Southern Floodplains and Low Terraces. This sub-region has large sluggish rivers and backwaters with ponds, swamps, and oxbow lakes. It includes oak-dominated bottomland hardwood forests, and some river swamp forests of bald cypress and water tupelo. Together, these comprise a river eco-region that provides important wildlife corridors and habitat, most notably the Congaree National Park.

HYDROLOGY

A watershed can be defined as the entire land area that contributes water, sediment, and dissolved substances to a stream, lake or estuary, forming a natural boundary for that particular water resource. Individual watersheds come in a variety of sizes based on local surface topography and can be delineated on a hierarchical order of different geographic scales. The natural function of a watershed is to catch, store, and safely release water as a fundamental part of the hydrologic cycle.

South Carolina can be divided into four major watersheds or river basins which include:

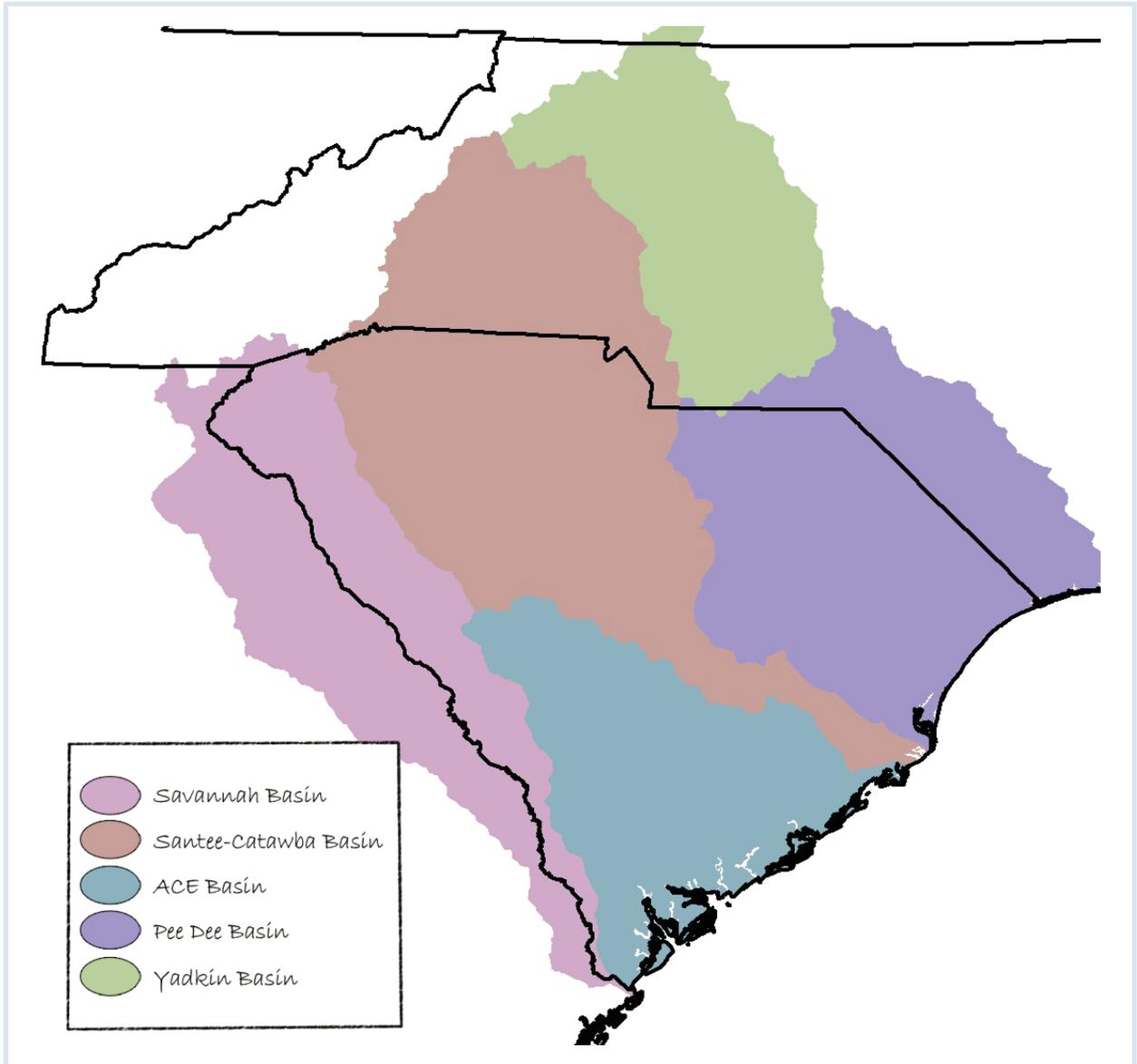
- the Santee-Catawba basin which drains approximately 34% of the state's land area;
- the Yadkin-Pee Dee Basin which drains 25 % ;
- the Savannah River Basin which drains 15%;
- and the ACE (Ashepoo, Combahee, Edisto) Basin which drains approximately 26%.



The boundaries of these drainage basins connect the state of South Carolina with the neighboring states of North Carolina and Georgia. As illustrated in Figure x.x, the four counties that make up the Central Midlands region fall within two of these four major watersheds, the Santee-Catawba and the Ace. These major watersheds or drainage basins can be divided up into smaller sub-basins defined by the individual rivers and streams that drain into the larger water feature. Each water feature, from a major river to a small tributary, drains a single watershed and is simultaneously part of a larger drainage basin. Within the Central Midlands region, the four watershed sub-basins are defined by the following rivers: the Broad, the Saluda, the Congaree, the Wateree and the North fork of the Edisto, which forms the southwestern boundary of Lexington County.



The five rivers that run through the Central Midlands region each have an identity all their own. The Broad River basin dominates the central Piedmont section of South Carolina, flowing approximately 100 miles within



the state until merging with the Saluda River in Columbia to form the Congaree. The lower Saluda, running between Lake Murray and Columbia, is a beautiful and mostly undeveloped river, which was named as a State Scenic River in 1991.

Figure 3.3:
Major Watersheds of
the Central Midlands
Region

As the Congaree passes south of the city, it takes on the characteristics of slow, meandering Coastal Plain River, which it shares with the Wateree, before they merge in the southeastern corner of Richland County to form the Santee. The Edisto River is the only river within the region whose headwaters are situated locally, in the Sand Hills, rather than in the mountains or the Piedmont region of North and South Carolina. The Edisto has also been called the longest free-flowing black water river in the world. The term “black water” refers to the characteristic dark water that gets its color from

decaying organic materials of adjacent swamps.

South Carolina does not possess any large, naturally-occurring lakes. However, every major state river except the Pee Dee has been dammed to create hydroelectric power, which has formed a number of large lakes. The largest of these is Lake Marion/Lake Moultrie, created in 1941, which stands at 110,000 acres. Within the Central Midlands, Lake Murray is the largest, at 50,000 acres and the 5th largest in the state. The region's other two large lakes, their size and state-wide ranking, are as follows: Lake Wateree, 13,700 acres, 8th largest and Lake Monticello, 7,100 acres, 12th largest.

Wetlands are defined by the Clean Water Act as those areas that are inundated or saturated by surface or ground water at a frequency and duration sufficient to support a prevalence of vegetation typically adapted for life in saturated soil conditions. Wetlands generally include swamps, marshes, bogs and similar areas.

Wetlands can be generalized into two different types: forested and non-forested. Forested wetlands consist of natural or planted forested areas having a dominant tree crown closure of hardwoods, pines, gums, cypress, or any combination of these types. These areas are usually in stream or river floodplains, isolated depressions, and drainage ways and contain standing or flowing water for a portion of the year.



Non-forested wetlands consist of fresh-water marshes dominated by a variety of grasses, sedges, rushes, and broad-leaved aquatic associated with streams, ponded areas, and tidally-influenced non-saline waters. Both types are present in the Central Midlands region accounting for approximately 8% of the total land area. Richland County has the largest concentration of wetlands because it lies within the Southeastern Floodplains eco-region, and is bisected by two of the State's major river systems, the Wateree and Congaree. The vast floodplains of both rivers have considerable wetland acreage associated with them thus limiting the amount and scale of growth and development that can occur within these areas and creating numerous opportunities for the protection and restoration of critical environmental features.

The surface water quality in the region's rivers, streams and lakes varies considerably depending on the types of land uses that dominate within each basin, watershed and sub-watershed. Of the approximately 148 water quality monitoring stations in the four county region, 48% of them are impaired and do not support their designated use. The sub-watersheds with the highest concentration of impaired streams are mostly located in the developed areas surrounding the City of Columbia and the Town of Lexington, thus indicating that non-point source pollution from urban stormwater runoff is a significant source of regional water quality impairment.

PARKS, FORESTS, AND OTHER MANAGED LANDS

A considerable amount of publicly owned and protected land exists within the Central Midlands Region. These properties range from National Parks and Forests to land owned and/or managed by State, Local and Non-governmental agencies or organizations. Of the various parks, forests and other managed lands within the Central Midlands, the crown jewel of them all is Congaree National Park, South Carolina's only national park. This 22,200 acre park protects the largest contiguous tract of old-growth bottomland hardwood forest remaining in the United States." The area boasts approximately 90 tree species, with many trees holding the state record for size. Loblolly pines as tall as 169 feet can be found within the park. In 2003, Congaree's designation was changed by Congress from a National Monument to a National Park. This change means that Congaree is now seen as on par with other internationally-recognized U.S. parks such as Yellowstone, Yosemite, the Grand Canyon and the Everglades, resulting in much greater publicity for the park. This has led to a significant increase in visitors to the park, with a jump in attendance of 30% to 40% from December 2003 to March 2004 over the same period the previous year, for example.

The National Forests were created to retire farmlands, control soil erosion, regulate stream flow, and produce timber. In South Carolina, the lands that became national forests were predominantly eroding old farm fields and gullies or extensively cutover forests. With the work of the Civilian Conservation Corps, the land was slowly restored and has become productive again. Sumter National Forest is one of two national forests within the state of South Carolina and the Enoree Ranger District, headquartered in Whitmire (Newberry County), is the largest of the park's three Ranger Districts.

Fort Jackson's training center is the largest of its kind used for training new soldiers. Fort Jackson harbors a rich diversity of flora and fauna and includes some species found nowhere else in the state. The installation



boasts a unique sandhills seepage bog that harbors many rare and uncommon plant species. Fort Jackson is host to three endangered species: The Red-cockaded Woodpecker, Rough-leaved Loosestrife, and the Smooth Coneflower.

South Carolina's state park system had its origin two important national events of the 1930s, the Great Depression and terrible soil conditions experienced by farmers which came from poor soil management practices. Under the New Deal program of the Roosevelt Administration, the Civilian Conservation Corps provided labor to the

State of South Carolina to help restore and protect marginal farm land by reforesting these areas and converting them into public recreation areas. Sesquicentennial State Park in Richland County was created in this context. The park is 1,419 acres in size, with a 30-acre lake and proximate location to downtown Columbia. The highest point within Richland County lies within the park, 467 feet above sea level. The eastern fox squirrel, considered to be Significantly Rare within South Carolina, is located within the park, as are rare Atlantic White Cedar trees.

Harbison State Forest, which was also created from marginal farm land during the same time period, consists of 2,200 acres of active forest land adjacent to the Broad River. The forest's size and location within nine miles of downtown Columbia make it "one of the largest public green spaces inside the city limits of a metropolitan area in the eastern United States. Portions of the Forest are used to demonstrate the value of various forestry practices, from prescribed burning to thinning, harvest, site preparation and planting. The forest mix is roughly 40% loblolly and shortleaf pine, 40% natural longleaf pine, and 20% bottomland floodplain hardwoods and hardwood drains.

NATURAL DISASTERS AND HAZARD MITIGATION PLANNING

The Central Midlands Region is vulnerable to a number of different types of natural hazards due to prevailing weather and climate patterns, its unique geology and hydrology, its abundant forest resources, and its proximity to the coast which is always under threat from tropical storms and hurricanes as they sweep across the warm waters of the South Atlantic. Of all the natural hazards experienced over the past 30-50 years, wildfires, thunderstorms and hail events occur with the most frequency and have the highest

percentage chance of occurring on an annual basis. Floods, winter storms and drought are also common occurrences across the Midlands, with earthquakes, tornados and hurricanes occurring with the least frequency during any given year. While fatalities and serious injuries associated with each of these natural hazards are rare, they occur with enough frequency to cost Midlands's residents, businesses and governmental entities millions of dollars in damages every year.



In an attempt to mitigate these damages, the Federal Government passed the Disaster Mitigation Act of 2000 which provides the legal basis for establishing the Federal Emergency Management Agency (FEMA) mitigation planning requirements for State, local and Indian Tribal governments. The act requires governmental entities to develop and implement all hazard mitigation plans which outline strategies for reducing natural and social vulnerabilities to a localities most significant hazard threats. Non-compliance with these Federal Regulations (i.e., failure to develop and update the plan) will result in the inability of locality to be eligible for hazard mitigation grant assistance. In order to meet these requirements, Central Midlands Council of Governments is responsible for developing and maintaining a regional all hazard mitigation plan which can then be adopted and implemented by the local governments. This plan was originally adopted by the CMCOG Board of Directors in 2005 and a comprehensive update was subsequently adopted in 2010. The plan provides a number of policies and action strategies local jurisdictions can adopt and implement to reduce their vulnerabilities to natural hazard threats such as repetitive flooding and destructive winter storms.







4

TRANSPORTATION AND UTILITY SYSTEMS

INTRODUCTION

The Central Midlands region is served by a well connected multimodal transportation system consisting of highway, rail, bus transit and air infrastructure. Because the region is conveniently located in the middle of the state, the transportation network effectively connects the Columbia area to a number of other major metropolitan areas within the Southeastern United States including Charleston, Greenville-Spartanburg, Charlotte, Augusta, and Atlanta.

ROADWAY NETWORK

The most heavily used component of the transportation system is the roadway network which consists of a diverse inventory of Interstate, US, and SC highways. The backbone of this network is the interstate highway system which consists of three separate corridors that include I-26, I-77, and I-20. Interstate 26 traverses the state from east to west connecting Charleston with Columbia and Greenville-Spartanburg. Interstate 77 connects Columbia and Interstate 26 with the City of Charlotte 80 miles to the north. Interstate 20, also running from east to west, connects the City of Florence and I-95 with Columbia and Augusta where it continues on to the Atlanta metropolitan area.

Each of these major limited access freeways converge in the Midlands creating an interstate “loop” that surrounds the urban cores of Columbia, West Columbia, Cayce and Forest Acres. The loop is about 15 miles by 10.5 miles across. Over 175,000 people, more than 26% of the population of the region lives inside the loop. Downtown Columbia, the University of South Carolina, the principal commercial areas of Forest Acres, West Columbia and Cayce, and Richland Mall are all within the loop, and the Fort Jackson Army installation is immediately outside the loop on I-77. Two other roads, SC-12 and SC-277 have controlled access cross-sections and supplement the freeway system.

This system of freeways also provides excellent connectivity with the other US and SC arterial roadways that are part of the National Highway System. These important regional thoroughfares include US Highways 1, 21, 176, 321, 378 and 601; and SC Highways 6, 16, 48, 60, 262, 555 and 602. This extensive network of arterial highways provides excellent connectivity for area residents and commercial freight operators. Approximately 90% of the over 220 billion tons of freight commodities that move into, out of and within the Central Midlands Region moves by truck across the areas roadways.



MASS TRANSIT

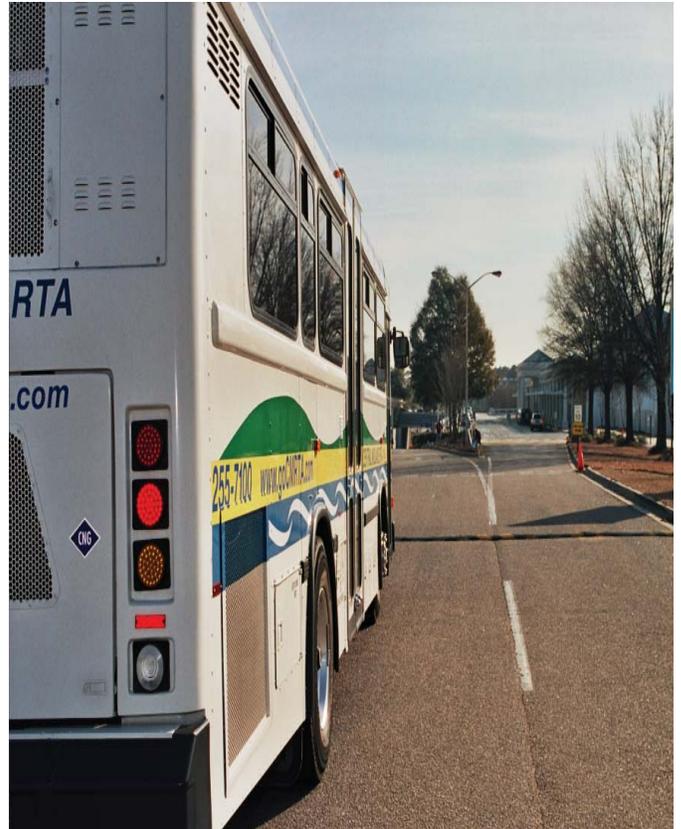
Public transportation services in the Midlands are traditionally synonymous with bus service. For over fifty years, transit service has been provided exclusively by bus, primarily operating within the boundaries of the City of Columbia. Interregional bus service has also been available and is operated by Greyhound Bus Lines (one of the largest intercity transportation providers in the country). Greyhound operates from a terminal in Downtown Columbia, with services from Columbia to other South Carolina communities as well as to other states.

There are however other transit providers. Taxi service, an important source of demand-response transportation, is available primarily in Columbia and Lexington, providing mobility for persons who may not have other means of transportation available. Rural public transportation is federally subsidi-

dized for eligible local transportation providers in rural areas and communities with population less than 50,000 and is available for some communities in the region. Fairfield Transit offers limited service within Fairfield County primarily providing transit connections between Winnsboro and Columbia. The Santee Wateree Transit Authority provides limited service connections between the Cities of Sumter and Columbia with the bulk of their Midlands services being offered to residents in Lower Richland County.

Within the Columbia urbanized area, the primary bus and paratransit services are operated by the Central Midlands Regional Transit Authority (CMRTA). The bulk of these routes are situated throughout the Columbia, West Columbia and Cayce municipalities. In addition, CMRTA sponsors, in partnership with SCDOT and the Santee Wateree RTA, the SmartRide Commuter-Focused Transit Program, a service for conscientious commuters who want a viable alternative to the traditional single-occupant vehicle commute. SmartRide currently has two main routes: service from Camden-Lugoff to downtown Columbia and Newberry to downtown Columbia.

CMRTA was formed in 2002, with its central office in Columbia. Before CMRTA gained responsibility for transit services in the region, fixed-route bus and paratransit services were operated by the SCANA Corporation, which is the parent company of South Carolina Electric and Gas



**CMRTA Bus at
the Columbia
Metropolitan
Airport**

(SCE&G), a local electric and gas utility. SCANA was required to operate transit service under a century-old State law, but an agreement was reached between SCANA, the City of Columbia, and the newly-created CMRTA to transfer ownership of the system to the public sector. As part of this agreement, SCANA was to contribute a significant monetary contribution toward transit operations, which is expected to help subsidize the system through 2008. Given the time limitations of this money (the “SCANA Trust Fund”), CMRTA has made efforts over recent years to secure additional funding. However, the current solutions utilized are only temporary fixes; while officials seek more permanent solutions.

The current CMRTA fixed-route bus network provides mobility connections for thousands of residents in the Central Midlands region. The system is operated through a hub-and-spoke system centered on downtown Columbia. All of the current routes operate on weekdays with limited service on Saturdays. All routes except two terminate at the downtown Columbia transfer center located at the intersection of Laurel Street and Sumter Street.

Dial-A-Ride Transit (DART) is CMRTA’s paratransit (demand-response transportation) service that is provided to individuals with disabilities who cannot use the fixed-route and trolley network. This service is provided to meet the requirements of the Americans with Disabilities Act (ADA). DART provides curb-to-curb, advance reservation, shared ride transportation service. This service is available to individuals who are certified as having a disability that prevents them from using traditional fixed-route services. DART serves customers located within $\frac{3}{4}$ of a fixed route, and are available during the same operating hours as the fixed-route service. There are no restrictions on the purpose or frequency of trips for DART customers.



Columbia, SC
Amtrak Station

In addition to bus service, the Central Midlands Region also has limited passenger rail service which is operated by AMTRAK through their Palmetto and Silver Service trains that offer connections between New York City, Georgia and Florida. Northbound service departs the Columbia Station at 11:00 pm and southbound service departs at 1:45 am.

FREIGHT RAIL SERVICE

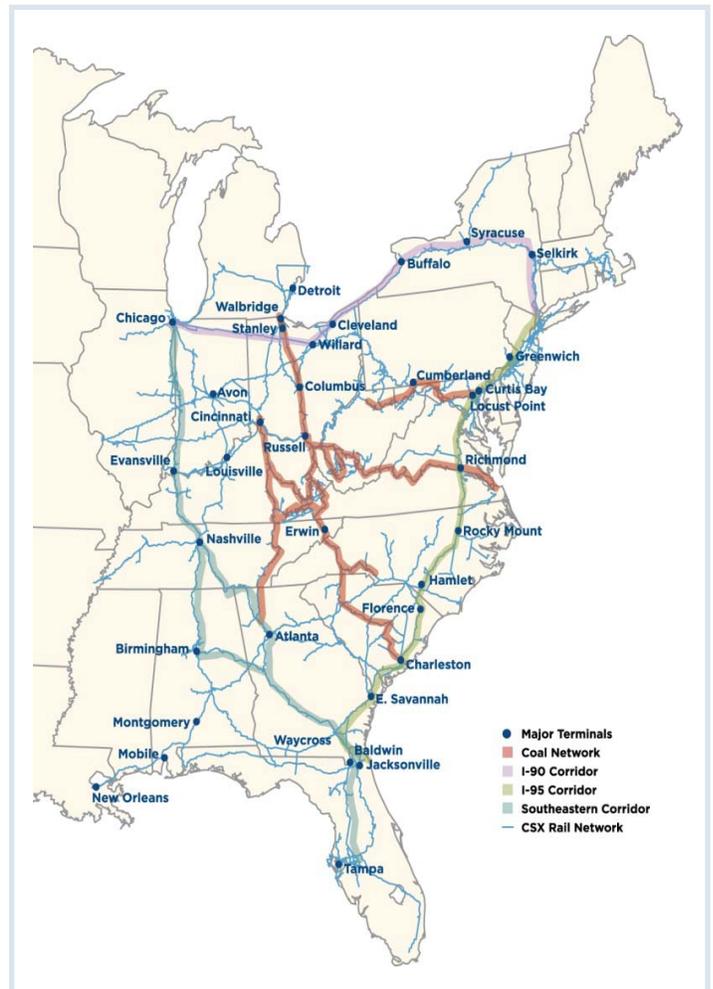
Both CSX Corporation and Norfolk Southern (NS) own and operate an extensive rail network through and within the Central Midlands Region with approximately 308 route miles of active railroad lines. NS owns approximately 177 miles (57%) of this total, CSX owns 126 miles (41%), and the SC Railway Museum owns 5 miles (2%). These rail lines are predominately single track, with no extended sections of double track. The usage of single track limits rail line capacity, since trains must wait on sidings to pass each other.

While Columbia is considered a rail hub, the rail traffic through the city is not highly dense compared to rail traffic of other markets in the southeast. Much of the heavy rail traffic between the Southeast and the Mid-Atlantic/Northeast is routed to the east of Columbia through Charleston and Savannah. The high density lines that link the southeast to the Midwest are routed west of Columbia through Atlanta.

AIR SERVICE

The Columbia Metropolitan Airport is located seven miles southwest of downtown Columbia. The airport covers 2,600 acres and it is situated in a prime geographic location for logistics operations.

More than 70% of the population and employment centers within the U.S. can be accessed via road transport within 24 hours from the airport. Because of these locational assets, the airport supports a robust air cargo network with scheduled flights from a number of freight providers including DHL, Fed Ex, and UPS. UPS operates a regional air cargo hub serving five states in the Southeastern U.S. and Amazon is in the process of opening a major distribution center in the vicinity.



CSX Rail Routes

UPS Plane
Taking Off at
the Columbia
Metropolitan
Airport



WATER AND SEWER SYSTEMS

Because the Central Midlands Region is so large and geographically diverse, spanning numerous watersheds and political jurisdictions there are a large number of both public and private water and sewer providers. The largest water provider in the region is by far the City of Columbia which owns and operates a complex treatment, distribution and storage system that serves customers within the city limits as well in other jurisdictions throughout Richland and Lexington counties. Between the Columbia Canal Water Treatment Plant and the Lake Murray Water Plant, the City of Columbia has a combined rated capacity of 150 million gallons per day and serves approximately 375,000 customers. The distribution system has over 2,400 miles of water lines, pump stations, storage tanks and pressure reducing valves that distribute water across 9 major pressure zones. Both water plants operate 24 hours a day, 365 days a year.

Other public water providers in the region include: the Cities of Cayce, West Columbia, Newberry; the towns of Batesburg-Leesville, Chapin, Eastover, Gaston, Lexington, Pelion, Prosperity, Ridgeway, Swansea, Whitmire, and Winnsboro; the Rural Water Districts of Gilbert-Summit, Jenkinsville, Mid-County (Fairfield), and Mitford (Fairfield County); and special purpose districts that include the Lexington Joint Municipal Water and Sewer Commission and the Newberry County Water and Sewer Authority. Carolina Water Service, Inc. is the only private utility company in the region that sells water to residential and commercial customers in several different areas.

Many of the same public utilities, especially those operated by a municipality, also provide sanitary sewer service. The largest public providers in the region include the Cities of Columbia and Cayce which both own and operate a large Waste Water Treatment Plant (WWTP). The Columbia WWTP has a permitted treatment and discharge capacity of 60 million gallons per day (MGD) while Cayce has a permitted capacity of 25 MGD. Some of the smaller public sewer providers include the City of Newberry; the towns of Batesburg-Leesville, Chapin, Lexington, Swansea, Winnsboro and Whitmire; and special purpose districts that include the Lexington Joint Municipal Water and Sewer Commission, the East Richland County Public Sewer District, and the Newberry County Water and Sewer Authority. The majority of these smaller entities own and operate their own WWTP, however, a few of them including the Town of Swansea, the Town of Lexington, and Lexington Joint Municipal Water and Sewer Commission send some or all of their waste to a the City of Cayce for treatment.

This consolidation of waste reflects a long term goal established in the 208 Water Quality Management Plan for the Central Midlands Region to consolidate and eliminate the discharges of smaller treatment plants by their collection infrastructure into a larger regional system. The implementation of this policy has had a positive impact on regional water quality as a number of smaller plants have been closed since the early to mid 1980s. Much progress, however, still needs to be made in certain areas such as the Lower Saluda River where a number of small private WWTPs are still in operation despite being in proximity to the collection systems of both Columbia and Cayce. Considerable public investment, however, would still need to be made in order to upgrade the existing infrastructure to where it would be technically feasible to make this goal a reality.

In addition to consolidating water and sewer facilities, most of the jurisdictions that have public utility systems must continually commit resources to upgrading and maintaining this infrastructure as it ages over time. The City of Columbia in particular has ongoing programs to continually upgrade and improve its existing and expanding water, sewer, and storm-water utility systems and is planning to spend a minimum of \$100 million each year beginning in 2012 on these upgrades.



Newberry County Egg Watertower



City of Columbia Sewer Line along Kinley Creek in Lexington County



ENERGY

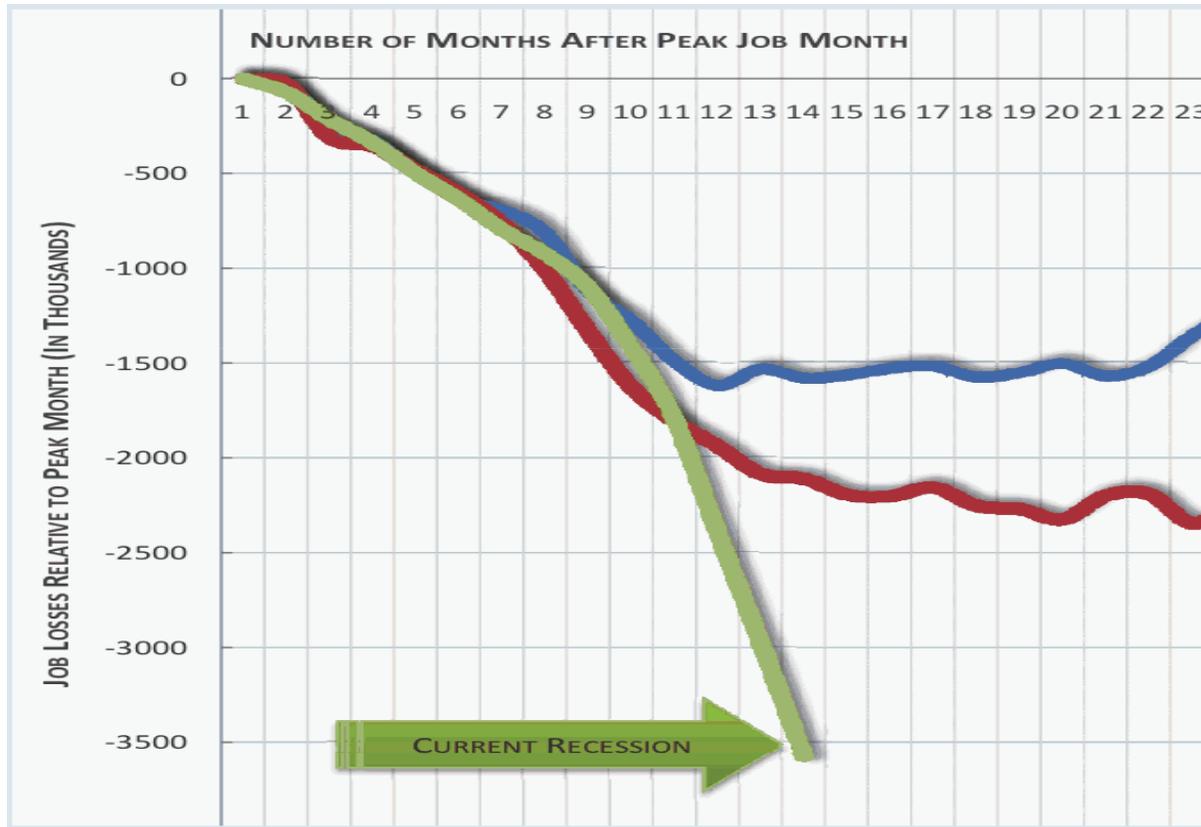
The Central Midlands region's energy portfolio is almost entirely determined at the state-level. Almost all electric power is consumed from the grid, which interconnects the area with the rest of the State (and beyond). Coal and nuclear-based generation dominate the energy portfolio, despite their respective negative impacts on local air quality and energy security. Hydropower, biomass generators, solar photovoltaics and other renewable energy technologies are already providing some energy to the Midlands region. While their relative contribution to the energy mix is small, their presence demonstrates that these resources can successfully contribute to the region's energy portfolio.

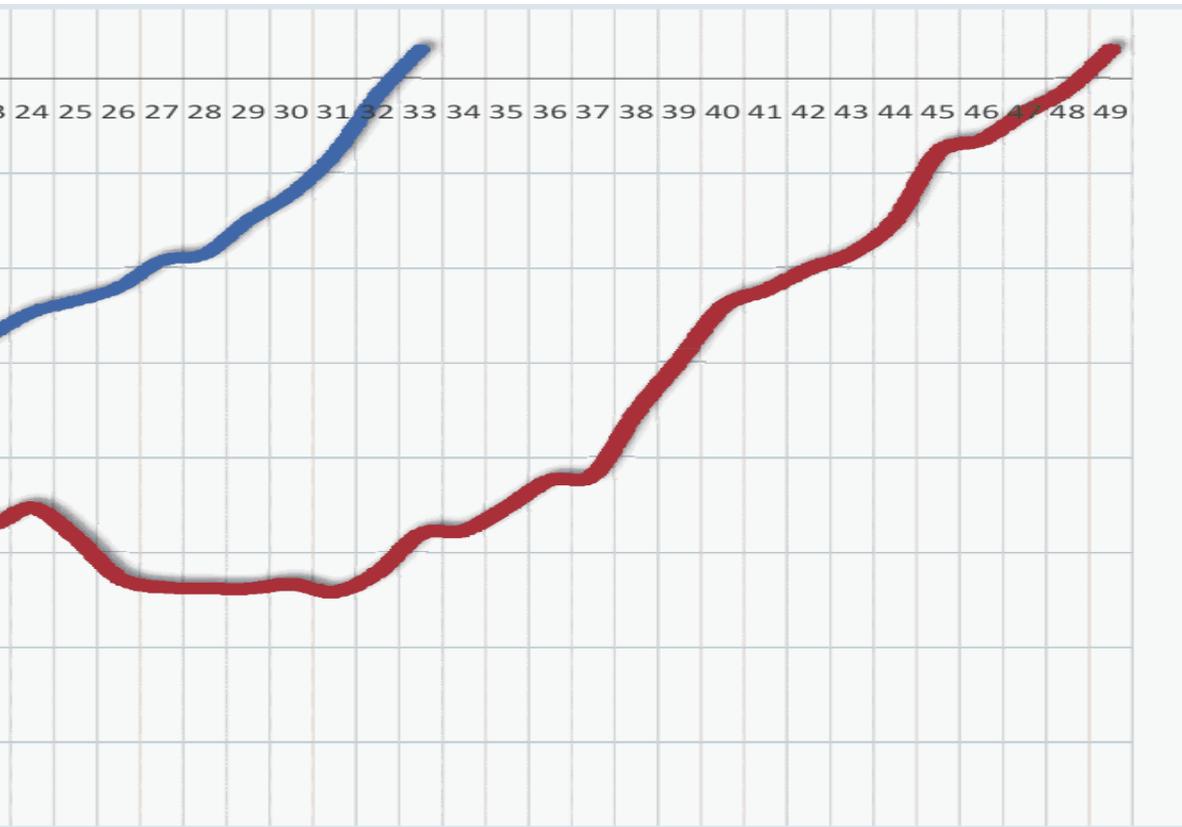
In 2009, more than half of the electricity generated and consumed in South Carolina came from nuclear power and another 34% came from coal, all of which was imported from out of state at a net cost of \$1.1 billion. Natural gas accounted an additional 9.7% of the total electricity generation in the State.

The area has been partitioned into six electric utility service territories. South Carolina Electric and Gas (SCE&G) is the dominant provider in the region's urban areas. The remaining 21% of the consumers in the

Central Midlands are located in outlying areas (including some of the large suburbs around Lake Murray) served by five different electric cooperatives: Mid-Carolina Electric, Fairfield Electric, Tri-County Electric, Aiken Electric, and Newberry Electric. The cooperatives buy electricity mainly from Santee Cooper (a State-owned enterprise), but they also purchase some from SCE&G, Duke Power, and Progress Energy. The breakdown of electricity generation for all of SCE&G's territory, representing one-third of the electricity sales in the State, comes primarily from three sources: coal (51%), natural gas (23%), and nuclear (21%). In contrast, 80% of Santee Cooper's electricity is generated by coal; although statewide, the stock of investor-owned power plants is quite mature, many of Santee Cooper's coal-fired plants are relatively new.

Renewable energy (including hydro) made up 4% of statewide generation in 2009. Even though the majority of this generation came from conventional hydroelectric sources, other renewable sources such as wood waste, municipal solid waste, and landfill gas contributed to the state's portfolio. There was no data reported for statewide energy generation from solar, wind, or other biomass, which is most likely due to the small amounts generated in the State.





ECONOMIC TRENDS

INTRODUCTION

The Midlands region of South Carolina includes a diverse economy that spans two rural and two urban counties. The region contains economic clusters that range from insurance technology to nuclear power to transportation and logistics and hydrogen fuel cell technology.

The last three decades were a period of sustained economic growth throughout the region. Economic and employment growth emerged from the addition of new service-providing firms and expansion of existing industries. While the region's competitive strengths and location of new industries have supported the growth of the 1980s, 1990s, and the early part of the 2000s, growth has slowed and even declined in some counties during the past five years. The manufacturing sector has been especially hard hit, with a number of major plant shutdowns in the region.



The data presented in this section captures the changing trends of the regional economy. Primary data sources include the U.S. Bureau of Economic Analysis, the U.S. Department of Labor, and the S.C. Department of Employment and Workforce. Due to the different methods used by these agencies in counting employment data, some discrepancies in employment totals may occur. Where possible, data was compiled specifically for the CMCOG Region (Fairfield, Lexington, Newberry and Richland Counties). In some cases data was not available by individual county. In these cases, the Columbia SC Metropolitan Statistical Area (Calhoun, Fairfield, Kershaw, Lexington, Richland, and Saluda Counties) defines the area for the data. All information compiled was the most recent data available.

GROSS DOMESTIC PRODUCT

Gross Domestic Product (GDP) is the widest measure of the state of the economy. The GDP is the aggregated monetary value of all the goods and services produced by the entire economy during the quarter (with the exception of international activity). The growth rate of GDP is a key indicator of the current economic situation. Generally, the U.S. economy grows at around 2.5 to 3% per year and deviations from this range can have a significant impact.

Growth above this level is often thought to be unsustainable and a precursor to high inflation. The Federal Reserve System usually responds to higher growth by trying to slow down the “overheated” economy. Growth below this range (and especially negative growth) means that the economy is running slowly, which can lead to increased unemployment and lower spending.

Gross Domestic Product (GDP) by metropolitan area is the sub-state counterpart of the U.S. GDP. GDP by metropolitan area is derived as the sum of the GDP originating in all the industries in the metropolitan area.

Real GDP by metropolitan area is an inflation-adjusted measure of each area’s gross product that is based on national prices for the goods and services produced within the metropolitan area. The statistics of real GDP by metropolitan area and of quantity indexes with a base year are derived by applying national chain-type price indexes to the current-dollar GDP-by-metropolitan-area values for the 61 detailed North American Industry Classification System (NAICS)-based industries.

The chain-type index formula that is used in the national accounts is then used to calculate the values of total real GDP by metropolitan area and of real GDP by metropolitan area at more aggregated industry levels. Real GDP by metropolitan area may reflect a substantial volume of output that is sold to other areas and countries. To the extent that a metropolitan area’s

	2001	2002	2003	2004	2005
Columbia MSA GDP	37,506	37,378	38,032	38,525	38,584
Annual Increase/Decrease	Unavail.	-1%	+2%	+2%	+1%
	2006	2007	2008	2009	2010
Columbia MSA GDP	38,941	39,030	38,011	36,825	36,804
Annual Increase/Decrease	+1%	+1%	-3%	-4%	0%

Source: U.S. Census Bureau, Census of the Population, 2000, 2010

output is produced and sold in national markets at relatively uniform prices (or sold locally at national prices), real GDP by metropolitan area captures the differences across metropolitan areas that reflect the relative differences in the mix of goods and services that the areas produce. However, real GDP by metropolitan area does not capture geographic differences in the prices of goods and services that are produced and sold locally.

Figure 5.1: Per Capita Real GDP - Columbia MSA 2001 - 2010

In 2010, the most recent year for which GDP data is available, the Columbia MSA generated \$36,804 million in goods and services, slightly less (.0006%) than the \$36,825 million generated in 2009. Since 2001, the area GDP has risen and fallen from year to year though by small amounts (Figure 5.1).

EXPORTS

Based on information reported from the Metropolitan Policy Program at the Brookings Institution, the Columbia MSA produced \$2.7 billion in total exports as of 2010, ranking 78th out of the 100 largest U.S. metro areas. As a share of its total economy, 8.5 percent of what it produces was exported, supporting 20,000+ jobs. In terms of composition, exports from the MSA are comprised of 71.5% goods, higher than the United States as a whole (66.8%). 28.5% of exports in the MSA are comprised of services, somewhat less the U.S. as a whole (33.2%). Average wages in its largest export industry were \$41,641, about the U.S. average. The metro has 5 export industry clusters: chemicals (\$360M); machinery (\$240M); transportation equipment (\$240M); business and services (\$230M); and travel and tourism (\$160M).

**Figure 5.2: Columbia MSA
Key Export Indicators
(2010)**

In Figure 5.2, Columbia MSA export key indicators are displayed. Among the 100 largest U.S. metro areas, the MSA ranks 78th in total exports with \$2.7B. The MSA’s 8.5% in export as a share of metro GDP ranks 70th and is considerably lower than the average for all 100 metro areas (9.8%) and the U.S. as whole (10.7%). While the MSA ranks well in the areas of manufacturing contribution to export growth (7th) and export growth rate by value (22nd), overall, the data suggests that the Columbia MSA has room for improvement in exporting goods.

	Metro	Metro Rank	100 Largest Metro Areas	United States
Exports (in US billions)	2.7	78	1,011	1,562
Exports as a Share of Metro GDP	8.5%	70	9.8%	10.7%
Number of Export-related Jobs	20,100	75	6,897,800	10,719,900
Export Growth Rate by Value	13%	22	10.6%	11.4%
Average Wages in Leading Export Industry (2008)	\$41,641	88	\$66,449	\$45,563
Mfg. Contribution to Export Growth	89%	7	75.9%	75%

Source: Brookings Institute - Export Nation 2012

OCCUPATIONAL PROFILE

The occupational profile of the region reflects the work performed by the region’s residents, whether they work in the region or another region. Figure 5.3 presents the occupational profile of the region’s residents. The workforce is well diversified with Management/Business occupations (37%) accounting for the highest share, followed by Sales & Office (26%) and Service Workers (17%). This reflects strong employment orientation in service and government sectors. The smallest shares of occupations are found in Production/Transportation (10%) and Natural Resources/Construction (9%) reflecting the trend of declining agricultural and natural resource-based industries.

Industry employment trends are detailed in Figure 5.4. Educational, Health & Social Services (24%) and Retail Trade (11%) are the top industries for Columbia MSA residents’ employment. Other important industries include Manufacturing (9%), Professional Services (10%), tourism-based industries such as Accommodations and Food Service (9%), and Public Administration (9%).

	Number	%
Management, Business, Science & Arts	122,554	37%
Services	57,185	17%
Sales & Office	84,289	26%
Natural Resources, Construction, & Maintenance	30,943	9%
Production, Transportation, & Material Moving	33,747	10%

Source: U.S. Census Bureau, American FactFinder - 2008-2010 3-Year Estimates

SECTOR AND INDUSTRY TRENDS

Sector and industry trends reflect the work within the region, including out-of-region residents. The region’s employment base is largely a mix of small businesses across a variety of sectors. There are approximately 17,167 businesses in the Columbia MSA (Source: US Census – 2009 MSA Business Patterns), employing approximately 328,718 people (Source: U.S. Census – American FactFinder – 2008-2010 American Community Survey 3-Year Estimates). The majority of businesses employ twenty or fewer people. The small business sector of the economy is supplemented by major employers such as manufacturers, education institutions, and government agencies.

Figure 5.5 displays the region’s industry mix in 2000 and 2010. The majority of jobs in the region are in service-producing industries, which has increased by approximately 3% since 2000. Over 70% of the region’s jobs are in this sector, followed by Goods Producing (17%) and Government (8%). Both the Goods Producing and Government Sectors have decreased in jobs since 2000. These data highlight the shift from manufacturing to service industries that has occurred in the past several years.

Figure 5.6 presents a detailed breakdown of employment sectors in the region. Services (47%) and Retail Trade (11%) account for the highest share of employment. Other important job concentrations include Manufacturing (9%), Finance, Insurance and Real Estate (8%) and Government (8%).

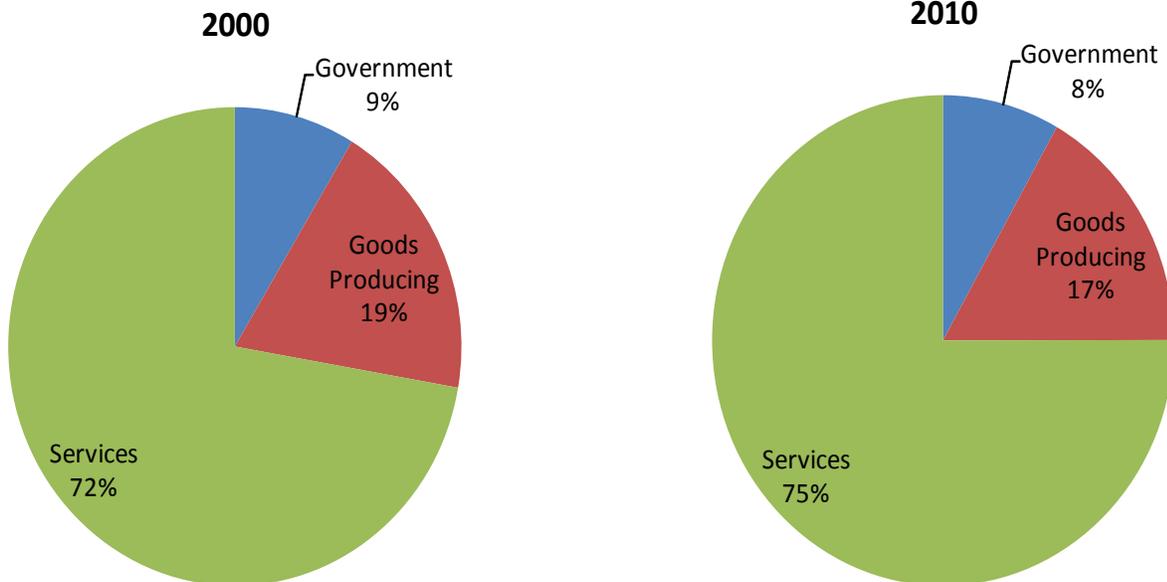
Figure 5.3:
Occupational
Profiles for the
CMCOG Region

Figure 5.4: CMCOG Region Residents Employment by Industry 2010

	Number	%
Agriculture/Forestry/Fishing/Hunting/Mining	3,155	1%
Construction	22,242	7%
Manufacturing	29,773	9%
Wholesale Trade	8,396	3%
Retail Trade	36,392	11%
Transportation/Warehousing/Utilities	14,014	5%
Information	7,341	3%
Finance/Insurance/Real Estate/Rental/Leasing	26,248	8%
Professional/Scientific/Mgmt/Admin/Waste Mgmt Services	32,159	10%
Educational/Health/Social Services	77,438	24%
Arts/Entertainment/Recreation/Accommodation/Food Service	29,839	9%
Other Service	14,819	5%
Public Administration	26,902	9%

Source: U.S. Census Bureau, American FactFinder - 2008-2010 3-Year Estimates

Figure 5.5: CMCOG Region Industry Mix – 2000, 2010



Source: U.S. Census Bureau, American FactFinder - (2008-2010 3-Year Estimates & 2000 Data)

Figure 5.6: CMCOG Region Total Jobs by Sector – 2000 , 2010

	2000		2010	
	Number	%	Number	%
Agri., Forestry , Fishing, Hunting, Mining	2,400	.8%	3,155	1%
Construction	20,111	7%	22,242	7%
Manufacturing	32,187	11%	29,773	9%
Wholesale Trade	10,109	4%	8,396	3%
Retail Trade	31,531	11%	36,392	11%
Transportation, Warehousing, Utilities	14,525	5%	14,014	4%
Information	8,342	3%	7,341	2%
Finance, Insurance, Real Estate (FIRE)	23,432	8%	26,248	8%
Services (Prof., Educ., Health, Food, etc.)	119,030	42%	154,255	47%
Government and Government Enterprises	24,789	9%	26,902	8%

Source: U.S. Census Bureau, American FactFinder – (2008-2010 3-Year Estimates & 2000 Data)

Between 2000 and 2009, the number of jobs in the region increased from 286,456 to 328,718, or 13%. Major shifts have occurred both in the total number of jobs within sectors and their relative value to the economic base. Sectors such as Manufacturing and Government have declined in both total and proportional terms while the Services sector has significantly increased since 2000. Some sectors, such as Construction, Retail Trade, and FIRE have remained stable in employment levels.

Figure 5.7 displays total jobs by county. The vast majority of the region’s jobs are in the urbanized areas (Lexington and Richland Counties). Together, these two counties account for 92% of jobs within the region (Figure 5.8).

Figure 5.7: CMCOG Region Total Jobs by County 2010

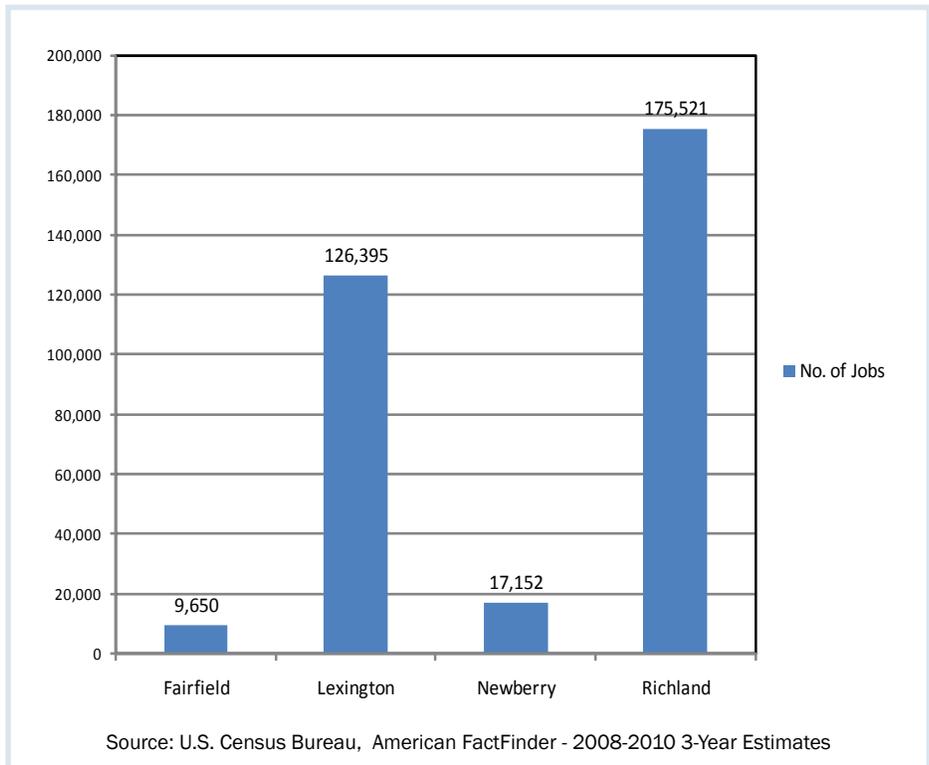
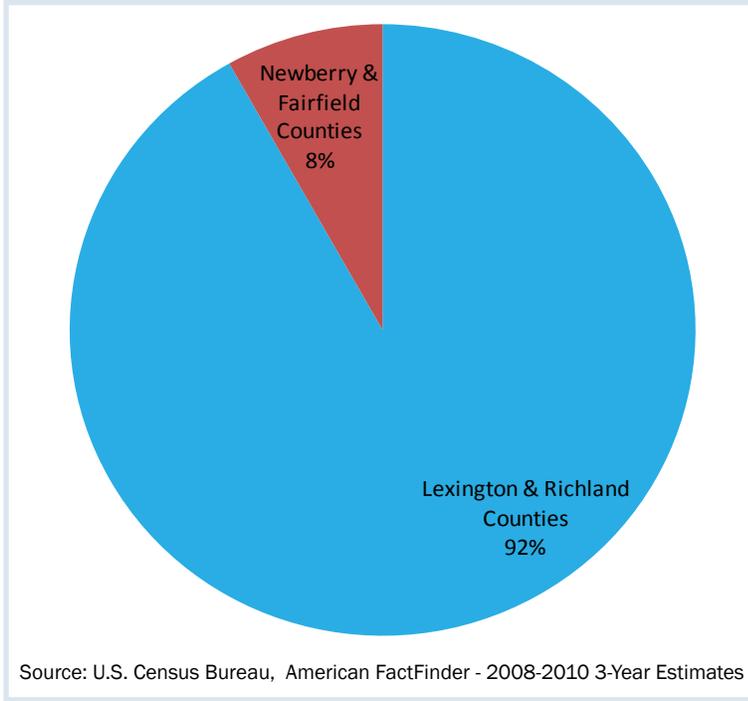
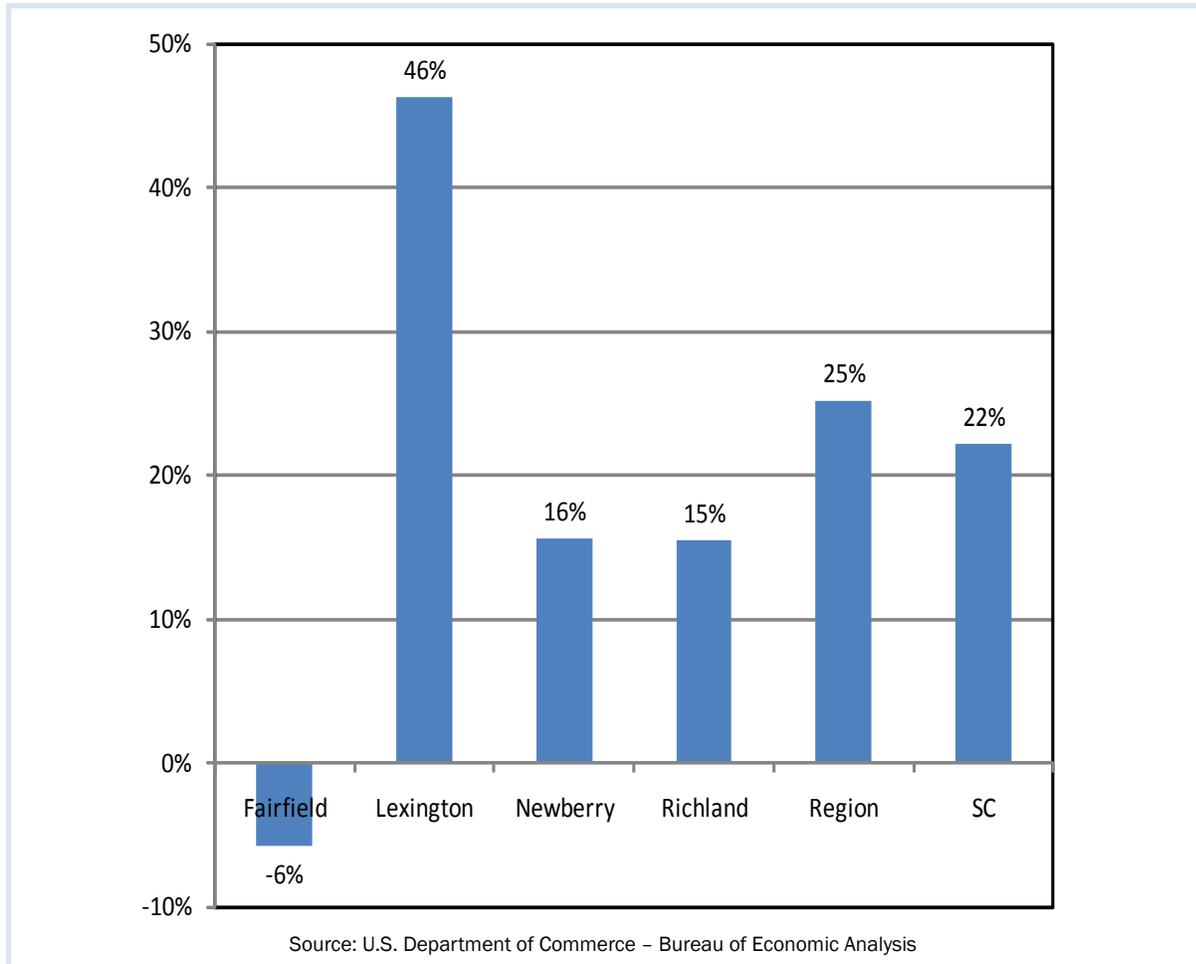


Figure 5.8: CMCOG Region Urban and Rural Jobs Comparison 2010



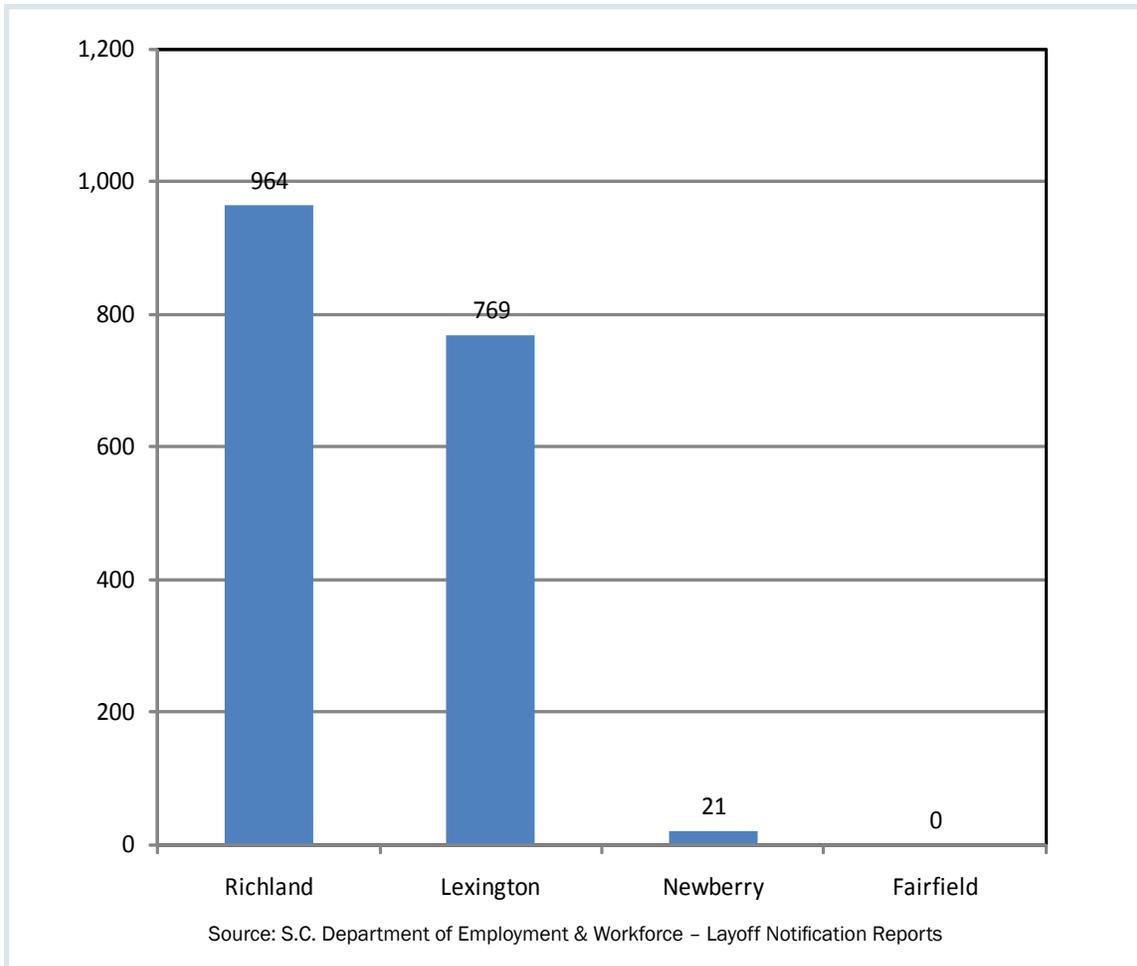
Examining job growth rates by county between 1990 and 2009 (Figure 5.9), Lexington County has seen job growth (46%) that exceeded all other counties in the region as well as the region as a whole and the overall growth in all of South Carolina. Newberry (16%) and Richland (15%) Counties experienced significantly less growth while Fairfield County declined in job growth by 6%. These patterns could be attributable to the tremendous development in Lexington County over the past several years and to the decline of the manufacturing sector particularly in rural areas.

Figure 5.9: Job Growth by County 1990 - 2009



Major employer losses are reported to the South Carolina Department of Employment and Workforce (SCDEW) for listing in the Layoff Notification Reports published monthly. Since 2009, there have been 1,754 job losses reported (Figure 5.10). It is important to note that these represent only major employers which are required to report closures by federal labor law requirements. It does not include employers that are not required to report, or jobs impacted by major employer closures, such as suppliers. Figure 5.11 provides a sample of recent major employer losses by County.

Figure 5.10:
Major Employer
Job Losses
2009-2011



**Pella Window
Manufacturing
Plant (Closed),
Lexington, SC**

Figure 5.11: Sample of Major Employer Losses

Company Name	County	Jobs Lost	Year
Viasystems	Newberry	16	2009
ADC	Lexington	100	2009
Continental	Richland	450	2009
NCR Services Division	Lexington	335	2010
Ramada Inn	Richland	62	2010
ALD Thermal Treatment	Richland	24	2010
UPS Shared Services	Richland	99	2011
Pella Corporation	Lexington	147	2011
ProBuild	Richland	23	2011
IAP Worldwide Services	Lexington	30	2011

Source: SC Department of Employment & Workforce – Layoff Notification Reports

SUBSECTORS

MANUFACTURING

The manufacturing sector in the region is characterized by diverse production sectors. Collectively, manufacturers encompass 574 businesses employing over 26,000 people. Consistent with trends in the state and national economies, the region’s counties made a gradual structural shift away from their traditional manufacturing and industrial base toward a more service-based economy during the past four decades. Region-wide, the number of manufacturing jobs between 1970 and 2009 has declined from a high of 36,163 in 1990 to 26,239 in 2009 (9,924 fewer jobs), its lowest level in 39 years (Figure 5.12).

Since 1990, all four counties and the State as a whole lost manufacturing employment. In absolute terms (with the exception of the State as a whole), Richland County lost the most, with its sector declining from 14,716 in 1990 to 10,499 in 2009, a loss of 3,382 jobs. In proportional terms, Fairfield County had the highest rate of manufacturing job losses. In 1990, the County had 2,639 manufacturing jobs. By 2009, this had declined to 497, a staggering 81% reduction. These manufacturing job losses are reflected in the sector’s impact on the overall economy. Manufacturing in the region accounted for 11% of total employment in 1990. By 2009, this number fell to 6% (Figure 5.13).

Figure 5.12:
CMCOG Region
Manufacturing Jobs
1970 - 2009

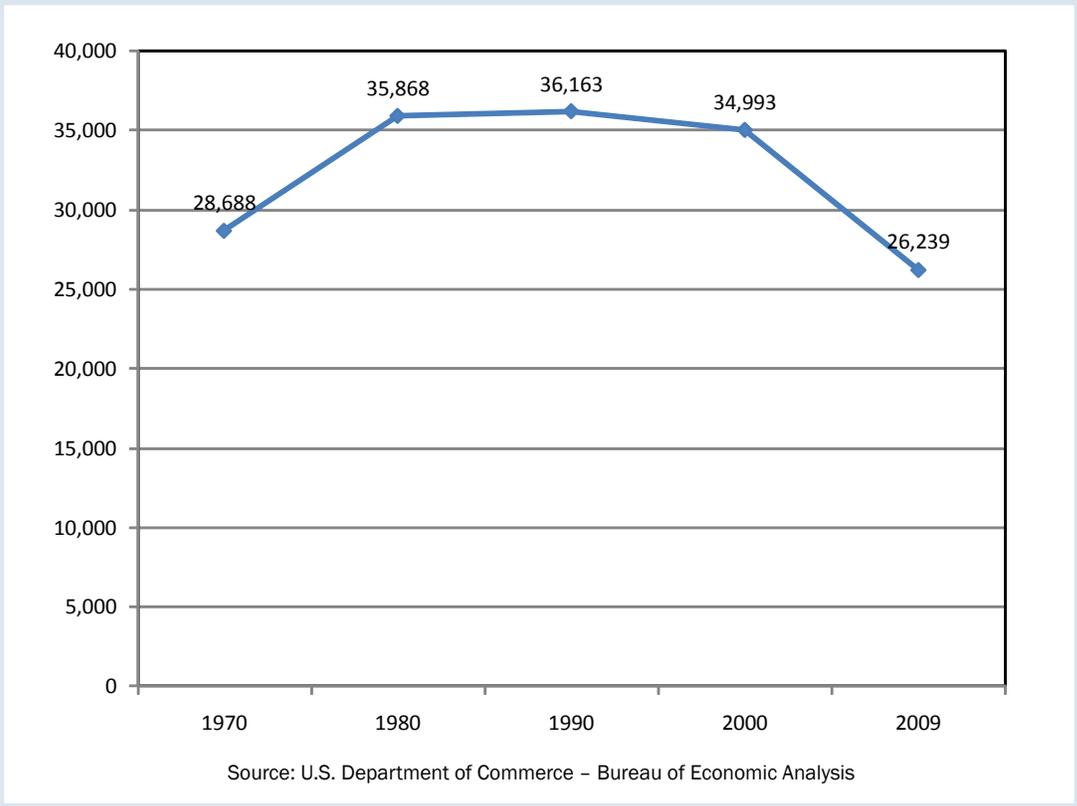
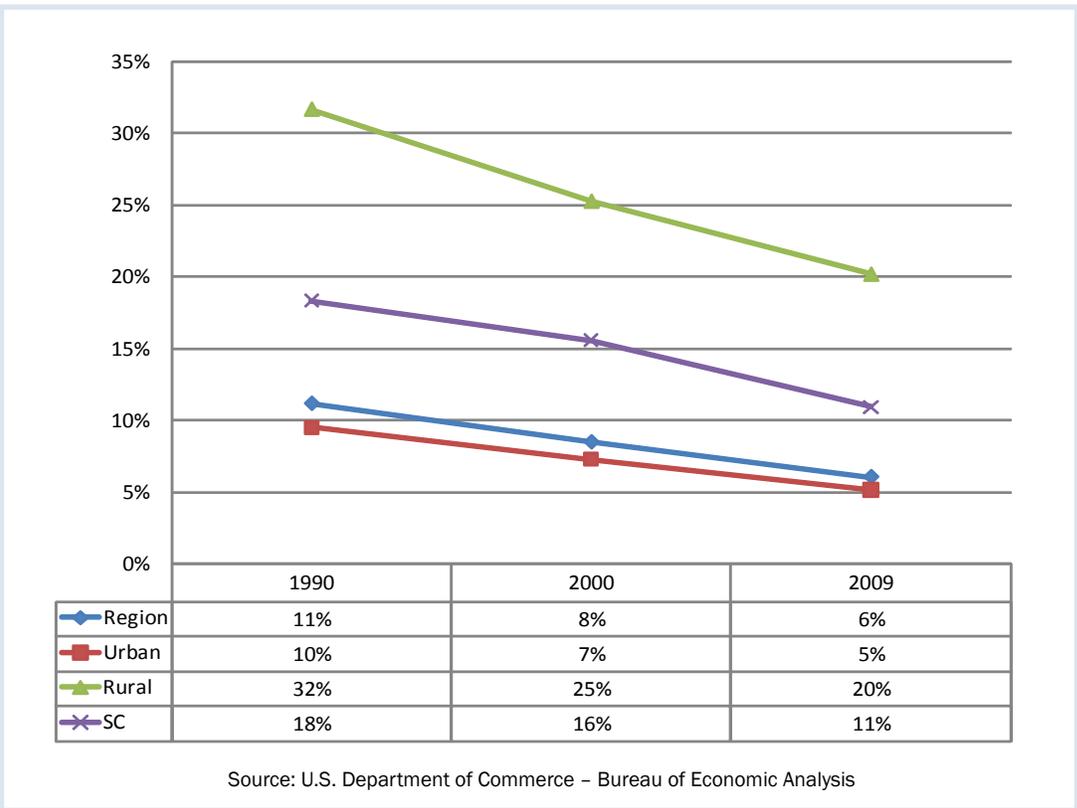


Figure 5.13:
Manufacturing
as a Percentage
of Total
Employment
1990-2009



The decline of manufacturing jobs is a growing national issue, affecting all U.S. regions. There are a number of causes that have been attributed to this decline:

- 1. 2001 Recession:** Much of the decline in manufacturing employment since 2000 reflects the recession that began in 2001 and the relatively weak recovery in demand that followed. The recession drastically reduced demand for goods in the both the United States and the rest of the world. Those cyclical losses in the sector have persisted ever since.
- 2. Manufacturing Productivity:** Over recent decades, U.S. manufacturers have continually invested in better capital goods and manufacturing techniques in order to remain competitive. There has been a significant increase in manufacturing productivity due to technology, capital investment, and entrepreneurialism. Those changes have enabled manufacturers to raise their output and keep pace with overall economic growth without a corresponding increase in the number of workers that they employ.
- 3. Changing Consumption Patterns:** The share of consumer spending devoted to manufactured goods has declined over time both in the United States and in other industrialized nations, even though demand for manufactured goods has increased in absolute terms. As a consumers' income has risen, they have increased their purchases of goods but boosted their spending on services even more.
- 4. Competition from Foreign Producers:** A portion of the long-term decline in employment in some manufacturing industries can be linked to the expansion of trade. The U.S. trade problems in manufacturing are caused by longer-run shifts in comparative advantage that favor lower-cost overseas production. The gains from trade arise as nations specialize in the goods and services that they can produce efficiently relative to other countries. Thus, the expansion of trade necessarily involves changes in the mix of products. The United States has specialized in products requiring a highly skilled labor force even as lesser jobs have shifted to countries where labor is less skilled. In the apparel sector, for example, the number of jobs in the United States has declined from over 900,000 in 1990 to less than 300,000 today.
- 5. Changes in the Structure of Manufacturing:** Finally, manufacturing employers increasingly have met short-term fluctuations in demand not by adding permanent staff but by hiring temporary workers through agencies and by contracting with outside firms to provide certain non-core support functions – for example, cafeteria, janitorial, and payroll-processing services – which traditionally had been performed in-house and therefore had been counted as manufacturing jobs.

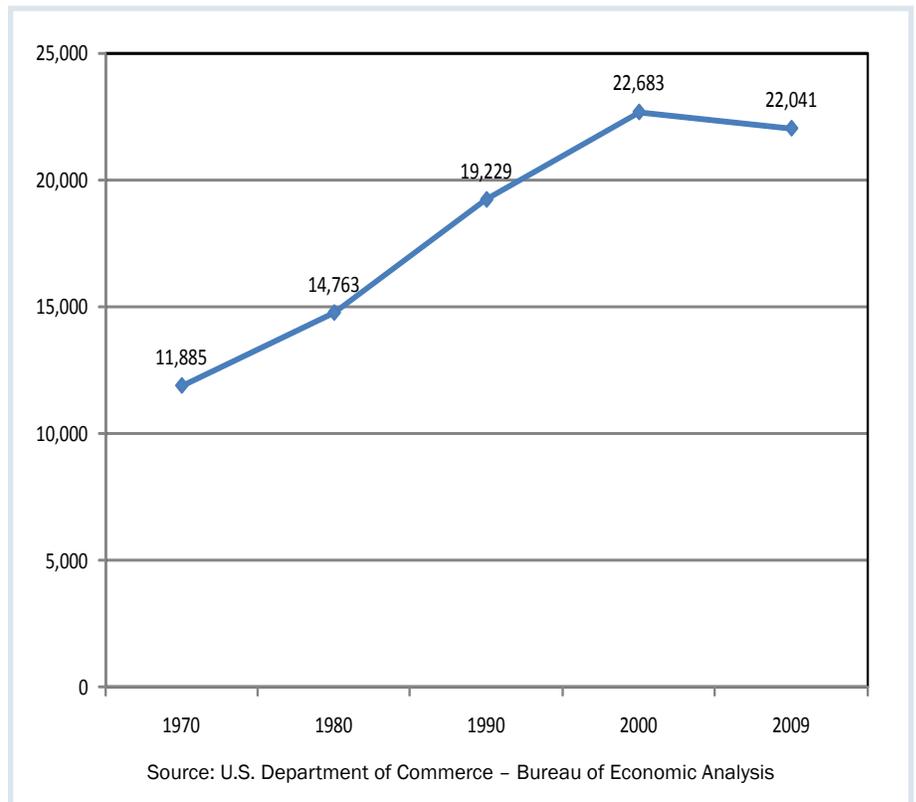
CONSTRUCTION

The construction sector comprises establishments primarily engaged in the construction of buildings or engineering projects (e.g., highways and utility systems). Establishments primarily engaged in the preparation of sites for new construction and establishments primarily engaged in subdividing land for sale as building sites also are included in this sector.

Construction work done may include new work, additions, alterations, or maintenance and repairs. Activities of these establishments generally are managed at a fixed place of business, but they usually perform construction activities at multiple project sites. Production responsibilities for establishments in this sector are usually specified in (1) contracts with the owners of construction projects (prime contracts) or (2) contracts with other construction establishments (subcontracts).

The construction sector has remained relatively steady in job growth over the past 40 years gaining over 10,000 jobs. Collectively, this sector employs 22,041 people (Figure 5.14), 85% more than in 1970. It is the eighth largest employment sector in the region.

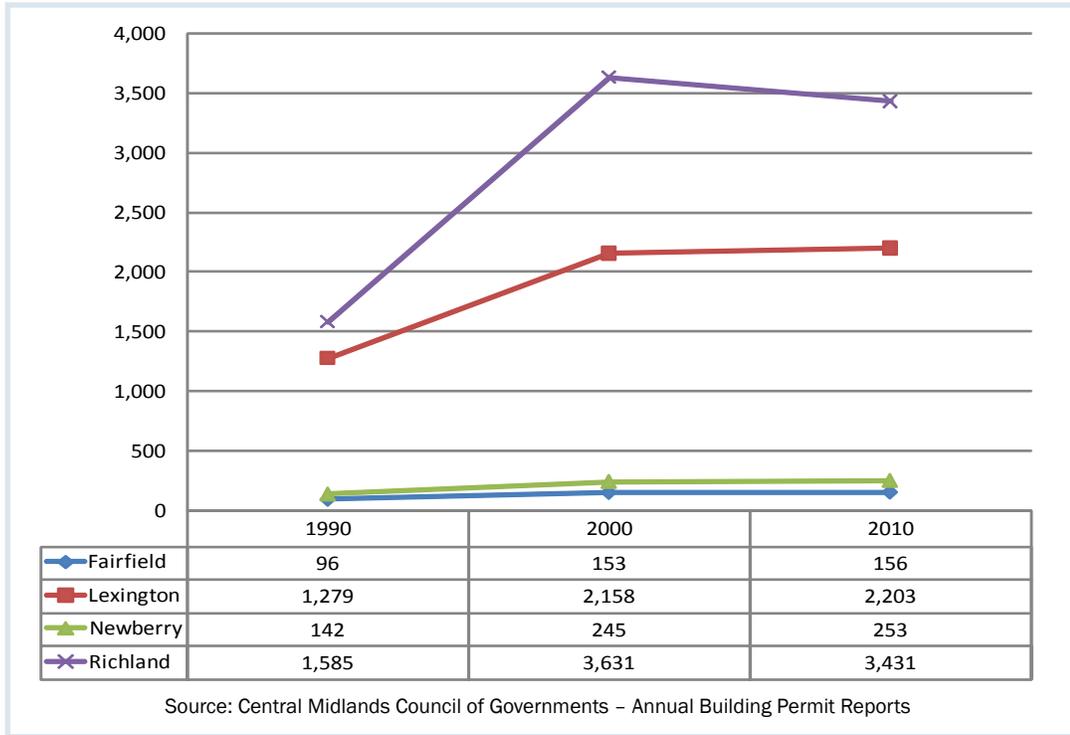
Figure 5.14: CMCOG Region Construction Jobs 1970 - 2009



Building Permits

Construction activity and employment can be closely associated with building permit data. As seen in Figure 5.15, the trend of building permit issuance is consistent with the change in the economy after 2000. While significant increases occurred in all counties between 1990 and 2000, after 2000, growth slowed dramatically and actually decreased in Richland County.

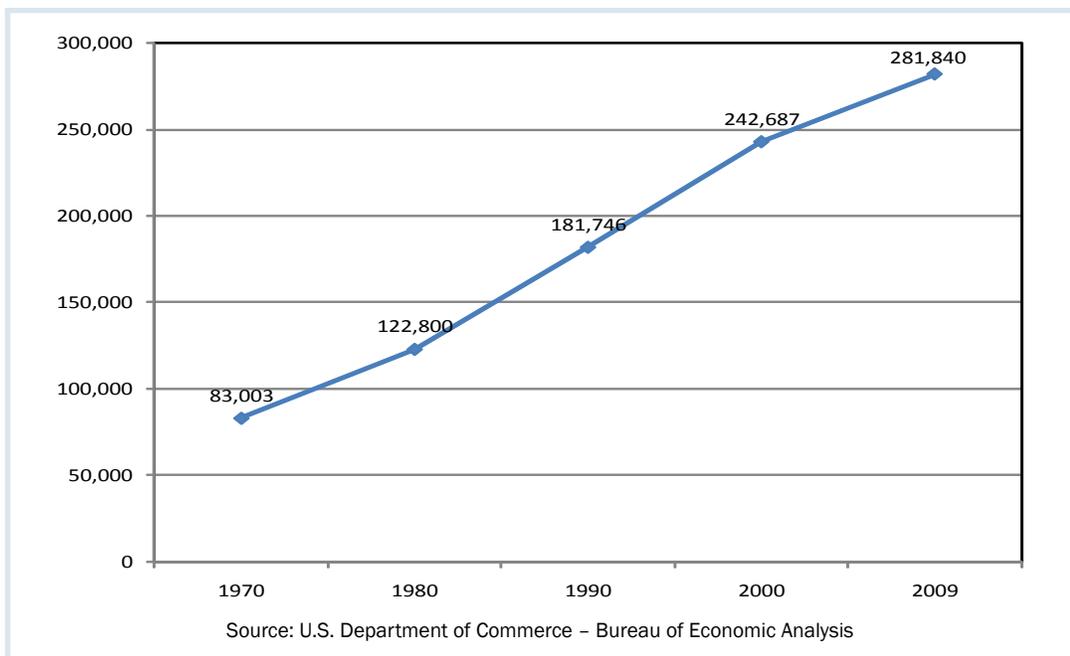
Figure 5.15:
Building
Permits Issued
1990-2010



SERVICE SECTOR

The service sector is an aggregate of several service industries ranging from Accommodation & Food services to highly Professional services. The sector's distribution also reflects an area's economic base. For example, localities with high numbers of service sector jobs in Arts & Entertainment and Accommodation & Food services tend to be tourism-oriented while areas with significant Management, Professional & Technical services tend to have stronger commercial and industrial bases.

Figure 5.16:
CMCOG Region
Service Sector
Jobs 1970 -
2009

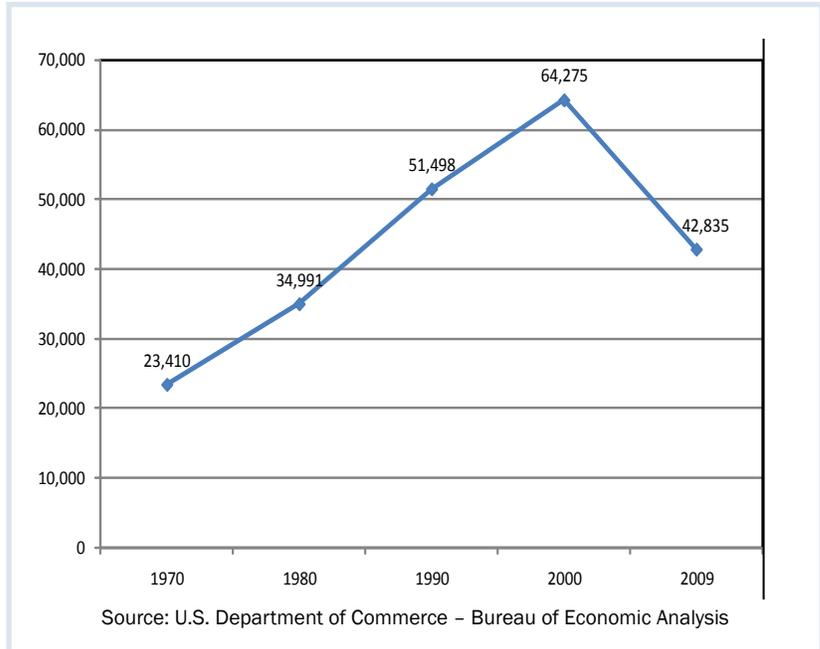


Consistent with state and national trends, the service sector in the region has been responsible for most of the job growth in the past decade. Collectively, this sector employs 281,840 people (Figure 5.16), 14% more than it employed in 2000. It is the largest of all employment sectors in the region.

Figure 5.17:
CMCOG Region
Retail Trade Jobs
1970 - 2009

RETAIL

Retail is an important economic sector in the region, with 2,790 retail establishments employing 42,835 (Figure 5.17). Since 2000, however, retail employment in the region declined by 33%. One possible explanation for the statistical decline is the United States Bureau of Economic Analysis (BEA) jobs reclassification in 2001 that resulted in many jobs formerly classified as retail trade now classified as service jobs.



Retail Pull Factors

Retail pull factors are a metric used to examine the relative strength and economic competitiveness of an area. The pull factor is calculated by dividing an area’s per capita retail sales by the state’s per capita retail sales. Pull factors greater than 1 represent retail sector strength, while pull factors less than 1 show sector weakness.

Figure 5.18 lists overall retail pull factors for the region using the latest data available (2007). Only one county, Lexington, has a retail sales pull factor above 1, indicating that three of four counties have retail sales losses to other counties. This is reflected in region-wide sales pull factor of .94.

Figure 5.18:
Retail Pull
Factors by
County

County	County Per Capita Retail Sales (2007)	SC Per Capita Retail Sales (2007)	Retail Sales Pull Factor
Fairfield	\$9,280	\$12,273	.76
Lexington	\$15,027		1.23
Newberry	\$9,707		.79
Richland	\$12,127		.99
Region Avg.	\$11,535		.94

Source: U.S. Census Bureau, State & County QuickFacts

addition, more than 100,000 family members visit the region each year to attend basic training graduation activities, patronizing local hotels, restaurants and shopping areas.

McEntire Air National Guard Station (ANGS) is located approximately 16 miles southwest of Columbia. The 2,400-acre base is owned by the US Government and is operated by the South Carolina Air National Guard. McEntire ANGS owns 2,344 acres and leases approximately 64 acres from the State of South Carolina. Additionally, there is a small parcel of privately owned land within the base boundary; however, neither the leased land nor the privately owned land contain utilities.

The base has a total of 95 buildings: 90 industrial, 4 administrative and one services totaling 263,000 square feet. There is no family or transient housing. Recent construction includes an addition to the avionics building (2,500 square feet) and replacement of the air traffic control tower and aircraft support equipment facility (14,600 square feet total). There are 550 full-time ANGS personnel on base which increases to 1300 one weekend per month. Additionally, there is a small cadre of Army personnel on base, increasing to 400 every other weekend.

MEDICAL / HEALTHCARE

The region prides itself on being a leader in providing quality health care services. Healthcare is another important economic sector in the region, employing 38,266 as of 2010. Since 2001, employment in the healthcare sector has steadily increased by 15% (Source: U.S. Bureau of Labor Statistics – 2001-2010 Data). As healthcare is grouped within the Services sector in most statistical reports, it is difficult to find earlier historical data on growth in healthcare jobs.

The University of South Carolina's School of Medicine adds invaluable research and training resources. The university is one of the few in the country offering a graduate program in genetic counseling.



Palmetto Health is the State's largest and most comprehensive health care systems; its institutions in Columbia include Palmetto Richland Memorial Hospital, a 649-bed regional community teaching hospital serving all of South Carolina, and Palmetto Baptist Medical Center with 489 beds.

The Dorn Veterans Affairs Medical Center complex includes a 216-bed hospital and 5 community outpatient clinics located in Anderson, Florence, Greenville, Orangeburg, Rock Hill, and Sumter. Other Columbia hospitals are the William S. Hall Psychiatric Institute providing psychiatric and chemical addiction inpatient care for children and adolescents; G. Werber Bryan Psychiatric Hospital for adults; and the 64-bed Moncrief Army Community Hospital in Fort Jackson, among others.

Also serving the health care needs of the region's residents are Fairfield Memorial Hospital, a 50-bed hospital located in Winnsboro; Providence Hospital and Providence Heart Institute, a nationally recognized referral center for the diagnosis, prevention, and treatment of cardiovascular disease; and Lexington Medical Center, offering specialized care for breast cancer and prostate problems, plus advanced cardiac, vascular and pulmonary rehabilitation, outpatient surgery, a state-of-the-art emergency department, outpatient surgery and diagnostics, radiation oncology, radiology, surgery, and physical therapy.

FINANCE, INSURANCE & REAL ESTATE SECTOR (FIRE)

The FIRE sector has enjoyed tremendous growth throughout the region. Encompassing service products ranging from banking to real estate, it has been one of the main drivers of the region's employment growth. The region's FIRE jobs increased from 12,096 in 1970 to 46,506 in 2009, an increase rate of 74% (Figure 5.20).

The relative value of the FIRE sector to the total employment base is displayed in Figure 5.21. Since 1970, the percentage of FIRE jobs as a percentage of all jobs has grown 65%, a significant increase reflecting the importance of the sector to the regional economy and its categorization as an economic cluster.



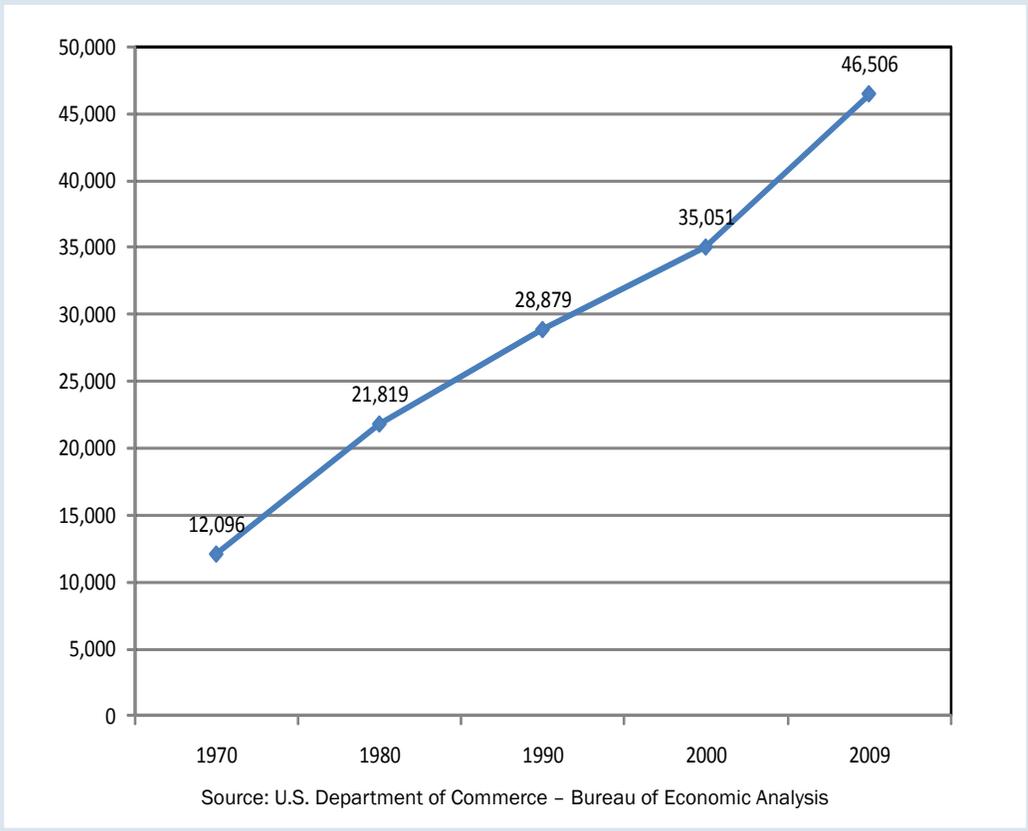


Figure 5.20:
CMCOG Region
FIRE Jobs
1970 - 2009

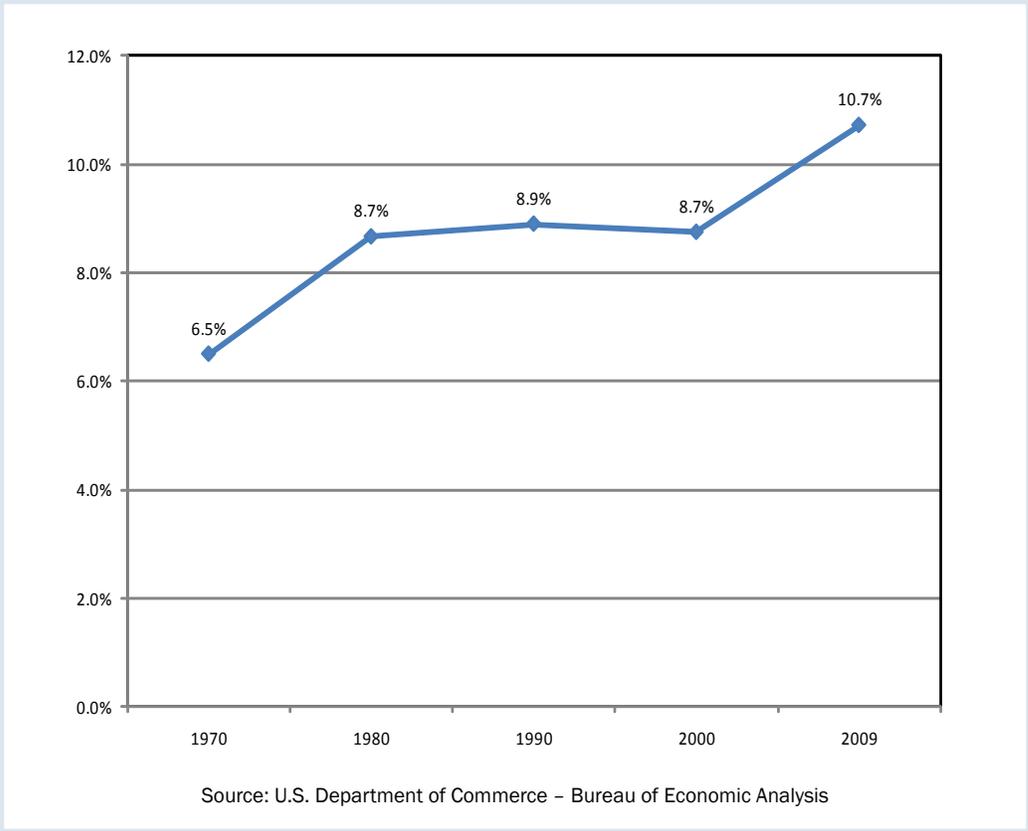


Figure 5.21:
FIRE Jobs
Percentage of
Total Jobs
1970 - 2009

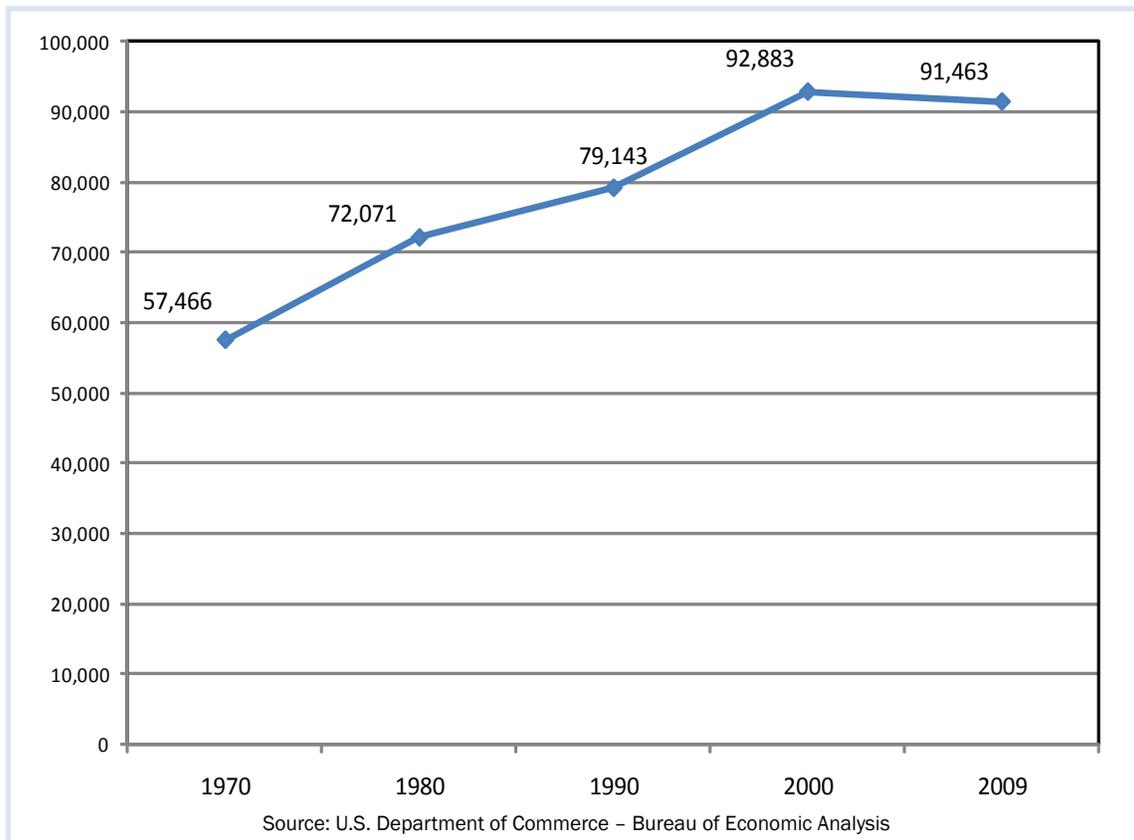
GOVERNMENT AND GOVERNMENT ENTERPRISES SUBSECTOR

The Government sector has traditionally been the most stable of all employment sectors. While changes in production and services are common, government work generally remains steady and grows in proportion to population growth. As the center of State government, the region is significantly affected by changes in this sector. Between 1970 and 2009, employment in Government & Government Enterprises increased from 57,466 to 91,463, or 60% (Figure 5.22). Interestingly, this sector had significant increases in employment up until the 2000's when, although population continued to increase, government workforce declined. This may be due to the recession and subsequent reductions in the public workforce due to ongoing budget cuts.

As a percentage of total jobs, the Government sector has seen some significant changes in the past four decades, declining nearly 10% since 1970 (Figure 5.23). This could be attributed to the dramatic rise in the service and other job sectors.

Figure 5.24 provides a breakdown of the Government subsectors. The largest percentage of Government employment is in the local government sector (38%) with most of those in local schools and municipal government offices.

Figure 5.22 : CMCOG Region Government & Gov't. Enterprises Jobs 1970 - 2009



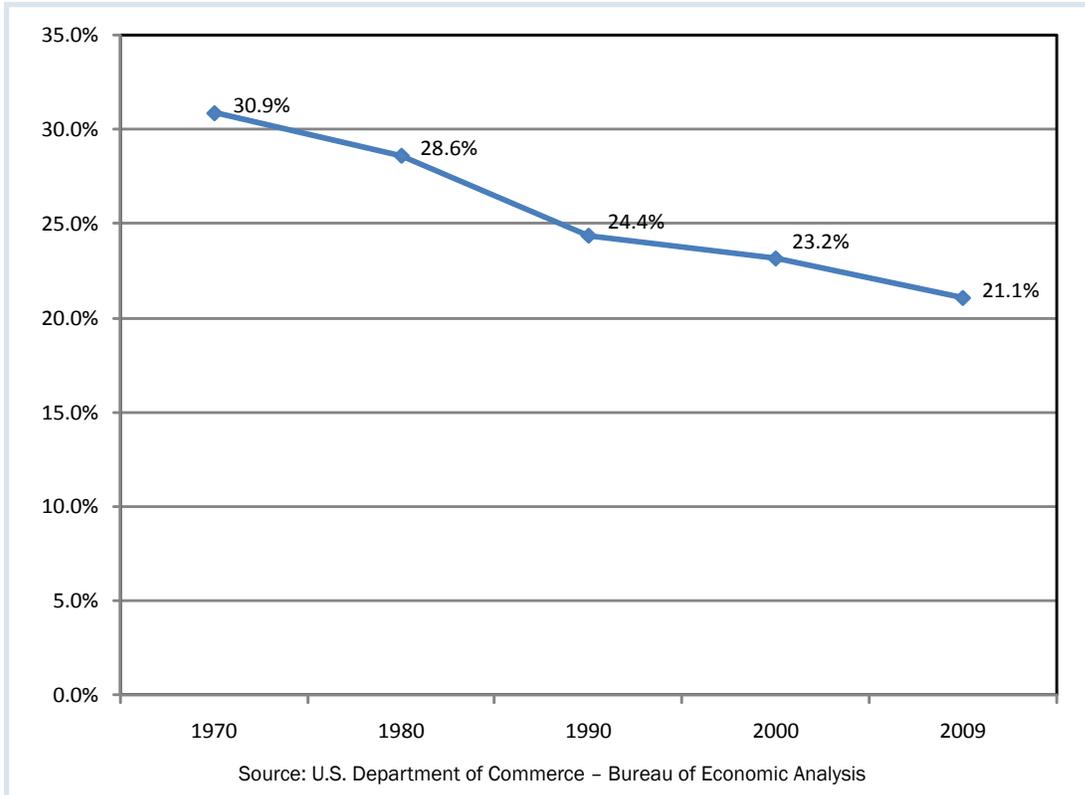


Figure 5.23:
Government
Jobs Percent
of Total Jobs
1970 - 2009

	Number Employed	Percent of Employed
Federal Government (civilian & military)	24,492	27%
State Government	32,872	36%
Local Government	34,099	38%

Source: U.S. Department of Commerce – Bureau of Economic Analysis

Figure 5.24:
Government
Subsector
Breakout,
2009

REGIONALLY SIGNIFICANT INDUSTRIES

Identifying regionally significant industries is important in considering the strengths, weaknesses, opportunities and threats of the regional economy, as well as measuring potential for growth.

The following analysis is based on U.S. Department of Labor ‘super sectors’, an aggregate of all industries falling under broad sectors. These super sectors are used because the U.S. Bureau of Economic Analysis employment numbers contain too many “Not Disclosed” sectors, rendering the data difficult to use in this type of analysis.

LOCATION QUOTIENTS

Location quotients are analytical tools used to determine which industries are concentrated in a region by comparing each industry's share of employment to the same measure for a state or the nation as a whole. Thus, the region's location quotient for a particular industry (i.e. manufacturing) is the ratio of the manufacturing share of total employment in the region to the manufacturing share of total employment in the United States. If the ratio is greater than 1, the industry is of more importance in the region than the U.S. as a whole. Industries with a high location quotient are typically (but not always) export-oriented industries, which are important because they bring money into the region, rather than simply circulating money that is already in the region (as most retail stores and restaurants do). Industries that have both high location quotients and relatively high total job numbers typically form a region's economic base.

Figure 5.25 presents location quotients for the region and the nation. The region's strong export sectors, according to the location quotient, are: Construction (1.03) and Trade, Transportation and Utilities (1.04). Though Leisure and Hospitality have a location quotient of 1.02 they are not export sectors. These sectors account for approximately 50% of the region's job base. The relatively high location quotient in Manufacturing (.99) and Professional and Business Services (.94) suggests that these sectors are also close to becoming strong export sectors.

Figure 5.25:
Location Quotient,
Columbia MSA
and the U.S. ,
2010

	Columbia MSA		United States		Location Quotient
	Jobs	%	Jobs	%	
Natural Resources & Mining	2,708	1.09	1,798,592	1.69	.64
Construction	13,250	5.33	5,489,499	5.17	1.03
Manufacturing	26,691	10.74	11,487,496	10.82	.99
Trade, Transportation & Utilities	59,687	24.02	24,442,734	23.02	1.04
Professional & Business Services	36,575	14.72	16,712,011	15.74	.94
Education & Health Services	38,288	15.41	18,656,160	17.57	.88
Leisure & Hospitality	31,034	12.49	13,006,814	12.25	1.02

Source: U.S. Bureau of Labor Statistics – Quarterly Census of Employment & Wages

SHIFT SHARE ANALYSIS

Shift-share analysis is an analytical technique that is used to compare regional growth rates over time with national growth rates by disaggregating growth into three components:

- Employment change due to national growth – i.e. the increase in employment that would be expected if an industry grew in a local area at the same rate as the national economy.
- Employment change due to the proportional shift – i.e. the change in employment that would be expected if an industry expanded or contracted at the same rate above or below the national growth rate locally as nationally.
- Growth due to the regional factors that cause a local industry to outpace or grow slower than the national industry. This value is referred to as the differential shift. The differential shift can be interpreted as the extent to which an area has a competitive advantage for that sector. A positive differential shift implies the area has a competitive advantage.

The number of jobs in the region is a primary indicator of local economic health and vitality. That is why it is important for the region to understand employment conditions. The employment data presented in this analysis were obtained from a sample of the U.S. Bureau of Labor Statistics' Census of Employment and Wages.

Figure 5.26:
Employment Changes,
CMCOG Region
2000-2010

Sector	Employment 2000	Employment 2010	Employment Change	% Growth 2000-2010
Education & Health Services	64,862	77,709	12,847	19.8
Trade, Transportation & Utilities	60,136	59,340	-796	-1.3
Professional & Business Services	34,348	35,889	1,541	4.5
Leisure and Hospitality	26,357	30,993	4,636	17.6
Public Administration	28,738	28,936	198	0.7
Manufacturing	33,322	25,562	-7,760	-23.3
Financial Activities	23,350	24,760	1,410	6.0
Construction	16,669	12,564	-4,105	-24.6
Other Services	8,772	9,503	731	8.3
Information	7,697	5,466	-2,231	-29.0
Natural Resources & Mining	1,934	2,146	212	11.0
	306,185	312,868	6,683	

Source: University of Georgia - <http://www.georgiastats.uga.edu/guide.html>

Using information from a shift share analysis report generated through the University of Georgia (<http://www.georgiastats.uga.edu/guide.html>), Figure 5.26 lists the employment changes from 2000-2010 for the four counties in the region. The industries are ordered according to how many people they employed in 2010. The Education and Health Services sector employed the most workers, followed by Trade, Transportation, and Utilities, and the Professional and Business Services sector is third. Overall, employment in the region increased by 6,683 jobs from 2000-2010.

SHIFT SHARE FOR THE REGION

The Industrial Mix Component

The industrial mix component is found by calculating the percent growth rate for an economic sector at the national level and subtracting it from the national growth component. Thus, the industrial mix component measures how well an industry has grown, net of effects from the business cycle.

Figure 5.27 lists these components for each sector. The highest industrial mix component was 23.6 percent in the Education and Health Services sector. After adding up across all eleven sectors, it appears that the industrial mix component was responsible for increasing the region's employment by 5,379 jobs. This indicates that the region has a concentration in industries that are increasing nation-wide, in terms of employment. The majority of these jobs can be attributed to growth in the Education and Health Services sector.

Figure 5.27:
Shift Share
Analysis,
CMCOG Region
and the U.S.
2000-2010

Sector	National Growth %	National Growth Jobs	Industrial Mix %	Industrial Mix Jobs	Competitive Share %	Competitive Share Jobs
Manufacturing	-1.6	-539	-32.0	-10,651	10.3	3,430
Trade, Transportation & Utilities	-1.6	-972	-4.1	-2,459	4.4	2,635
Financial Activities	-1.6	-377	-0.6	-144	8.3	1,932
Leisure & Hospitality	-1.6	-426	12.8	3,371	6.4	1,691
Professional & Business Services	-1.6	-555	2.0	702	4.1	1,395
Other Services	-1.6	-142	6.5	572	3.4	301
Natural Resources & Mining	-1.6	-31	7.0	135	5.6	108
Information	-1.6	-124	-22.6	-1,736	-4.8	-370
Construction	-1.6	-269	-15.6	-2,593	-7.5	-1,243
Education & Health Services	-1.6	-1,049	23.6	15,311	-2.2	-1,416
Public Administration	-1.6	-465	10.0	2,871	-7.7	-2,209
		-4,949		5,379		6,254

Source: University of Georgia - <http://www.georgiastats.uga.edu/guide.html>

The Competitive Share

Another component of shift-share analysis is the competitive share. It is the remaining employment change that is left over after accounting for the national and industrial mix components. If a sector's competitive share is positive, then the sector has a local advantage in promoting employment growth.

For example, in the Education and Health Services sector employment grew by 19.8%. Of this 19.8 percent, -1.6 percent was due to the national growth component and 23.6 percent was due to the industrial mix. This leaves a remainder of -2.2 percent that is attributable to the local conditions facing this sector. For the Education and Health Services sector, the competitive share translated into -1,416 jobs (i.e., -2.2 percent times the base employment level of 64,862 equals -1,416 jobs).

The top three sectors in competitive share were Manufacturing, Trade, Transportation, and Utilities, and the Financial Activities sector. Across all sectors, the competitive share component totals to 6,254 jobs. This indicates that the region is competitive in securing additional employment.

A positive competitive share component indicates that the region has a productive advantage. This advantage could be due to local firms having superior technology, management, or market access, or the local labor force having higher productivity and/or lower wages.

BUSINESS CLUSTERS

Due to rising global competition, the United States' capacity for generating stable, well paying jobs for a large number of workers is increasingly at risk. In this environment, regional industry clusters represent a valuable source of needed innovation, knowledge transfer, and improved productivity.

The development of cluster networks facilitates the interaction and sharing of information among businesses and institutions. More cost effective solutions to common problems may be achieved, such as training programs, collective purchasing, and shared marketing.

Cluster based economic development has proven to be an effective strategy for building a robust and competitive regional economy. Regional clusters are building blocks of American competitiveness and have the potential to:

- 1) Enhance the competitiveness of existing firms;
- 2) Accelerate the formation of high growth firms;
- 3) Recruit new firms into the region;
- 4) Spur new and innovative products, services, and processes;
- 5) Expand job creation in high wage occupations; and
- 6) Enhance existing and future workforce development programs.

The concept of identifying clusters came to the region as a result of a 2005 study developed by Professor Michael E. Porter of Harvard University and the Monitor Company Group (See South Carolina Economic Development Priorities). One of the results of the study was the formation of the Council on Competitiveness now known as New Carolina. The cluster approach is also embraced by the region's primary economic development recruiting agency, the Central SC Alliance.

NEW CAROLINA CLUSTERS

In 2008, New Carolina, EngenuitySC, and the Greater Columbia Chamber of Commerce formed a strategic partnership to identify, establish and accelerate the growth of target clusters in the region. The following clusters were identified by New Carolina based on the 2005 study and follow-up research on appropriate clusters for each region of South Carolina:

TRANSPORTATION, DISTRIBUTION AND LOGISTICS (TDL)

The Transportation, Distribution and Logistics (TDL) sector is a vital component of the region's and South Carolina's economy, linking its manufacturers and trading partners to wholesalers, retailers and consumers both nationally and globally. TDL shares many of the same industries, and each complements the other in the region. The Distribution cluster includes wholesale trade, trucking, rail transportation, air freight, couriers, messengers and delivery services, postage services and warehouse and storage. The Transportation and Logistics cluster includes trucking, rail transportation, air freight, couriers, messengers, and delivery services, postal services, warehousing and storage, school and charter buses, pipeline transportation, and scenic and sightseeing transportation.

Among the state's most prominent TDL stakeholders and important assets are:

- The SC State Ports Authority
- The SC Trucking Industry & the SC Highway System
- CSX & Norfolk Southern Rail Companies
- South Carolina's Airports
- Distribution Centers around the state
- Utilities (Santee Cooper, Duke Power, SCANA, Progress, rural SC cooperatives)
- Telecommunications companies
- Commercial Realtors, Developers and Construction companies
- SC Departments of Commerce and Transportation

The TDL industry in South Carolina includes over 2,600 business establishments employing more than 44,000 workers, paying nearly \$1.7 billion in annual wages. Multinational companies, such as Wal-Mart, Target, Starbucks and Home Depot rely on South Carolina's transportation infrastruc-

ture and statewide service providers to operate large-scale distribution centers in the state. Between 2006 and 2011, over 11,000 new jobs were created and more than \$1 Billion of capital was invested by companies locating or expanding TDL operations in South Carolina.

Nearly every job in South Carolina, from retail (goods distribution) to utilities (fuel transportation), directly benefits from the work of the TDL sector. Its direct impact can be more narrowly defined by employment and wages, directly from industry employers and indirectly from the supply chain to the industry. With this narrow definition of the TDL industry, the sector contributes nearly 75,000 jobs to South Carolina's economy. The transportation equipment manufacturing industry, not included in the previous figures, directly employs an additional 30,000 in the state and contributes several billion dollars in additional payroll. While the TDL industry itself is quite large, many workers are employed in transportation and material moving occupations outside of the sector. For instance, logistics managers employed by a retailer are not included in the TDL industry estimates. There are approximately 73,500 transportation and warehousing employees in South Carolina outside of the sector in addition to the 44,000 employed directly by the TDL industry.

Several key competitive advantages distinguish South Carolina from its TDL competitors:

Port Access

The Port of Charleston offers industry-leading efficiency and reliability, as rated by shipping giant Maersk. With the deepest water in the Southeast, Charleston is uniquely capable of handling large post-Panamax ships and offers shippers open ocean access from all of its terminals in a maximum of two hours transit time. In a study conducted by Wilbur Smith Associates for the SC State Ports Authority and published in 2008, the econom-



Port Authority,
Charleston, SC.

ic impact of the ports on the state's economy was projected at \$45 billion annually out of a total state economy of approximately \$150 billion (or about 30%.) The port economy was reportedly responsible for over 260,000 direct and indirect jobs as well, about 13.5% of all the nearly 2 million jobs in SC's economy. The total volume at The Port of Charleston, for years fourth in the country, has recently slipped from fourth to ninth. At the same time, The Port of Savannah, a neighboring competitor to Charleston in the global world of container shipping, has risen from ninth to fourth in the US. A great deal of economic activity is set to take place in the near future to address this issue. Three major positive events are expected to converge:

- Completion of the new State Ports Authority terminal in North Charleston
- Modernization of the Panama and Suez Canals, releasing tons of new cargo bound for ports on the Eastern US
- The opening of Jafza, an international distribution center in Orangeburg

Highway System

Five interstate highways offer excellent east-west and north-south access to major United States markets. South Carolina also offers ample available industrial and warehouse space with close proximity to its interstate highways. More than half of all available industrial properties in the state, as of February 2012, are within five miles of two interstate highways.

Rail Carriers

South Carolina's railways are served by two Class I rail carriers (CSX and Norfolk Southern). Rail passes through each of South Carolina's 46 counties, totaling over 2,200 miles of railway statewide. South Carolina has a distinct competitive advantage in its unusually wide rail clearances, allowing over-dimensional cars to travel throughout the state, from the Upstate to the Lowcountry.

Airports

Three major airports are conveniently located in South Carolina: Charleston International, Greenville-Spartanburg International, and Columbia Metropolitan. Columbia is home to a 281,000 square-foot UPS Southeastern Regional Hub while Greenville hosts a 120,000 square-foot FedEx facility. In addition, Charleston International has two ample cargo facilities. With the optimal location of these airports, all industrial space in the state is located within two hours of at least one major South Carolina airport.

Market Access

Over 200 million consumers live within a two days' drive from South Carolina, which accounts for two thirds of the United States population. South

Carolina's location is ideal for supply chain planners and distribution network optimization, with easy access to major population centers on the east coast and the growing population in the south.

Workforce

As a right-to-work state with the second lowest unionization rate in the country, South Carolina businesses can rely on a stable, efficient workforce at competitive wage rates and free from work stoppages. Over the past decade, South Carolina boasts the 8th fastest growing labor force nationwide, and fifteen colleges in South Carolina now offer degrees or specializations in logistics or transportation management.

INSURANCE, TECHNOLOGY AND SERVICES

The region has a national reputation in insurance technology and services that began a century ago when Seibels Bruce, which pioneered insurance in the region in 1869, invented the vertical filing cabinet. The 20+ Midlands insurance companies represent approximately 15,000 jobs with an average salary of \$62,000 and \$6.7 billion in economic impact according to findings presented in a March 2012 report titled *Insurance Technology and Services South Carolina: A case study on ITS|SC* and Columbia's emerging leadership in the global insurance technology industry. That comes close to the \$7.1 billion total economic impact of the region's military bases and more than Boeing's estimated \$6.1 billion economic impact on the Charleston area. The study – led by New Carolina, EngenuitySC, the Greater Columbia Chamber of Commerce and the City of Columbia's Business in Motion program – is the first effort to quantify the region's insurance technology and services assets and analyze successes and areas for growth.

- **40+ companies**
- **12,000 high wage jobs**
- **\$62,000 average salaries**
- **high growth firms**
- **\$5.5 billion in annual revenues**
- **\$1 billion in annual economic impact**

The study revealed a growing industry that is already sizable with a profound impact on the region economically. A majority of firms reported they either anticipate sales growth over the next year (2012/2013) or hiring to fill an estimated 1,200 open positions in Columbia insurance technology and services firms. The statistics were analyzed and vetted by the City of Columbia's Office of Economic Development and economist Dr. Joseph Von Nessen of the University of South Carolina's Darla Moore School of Business.

BlueCross BlueShield of South Carolina (BCBS), headquartered in the region, handles three-fourths of all the insurance claims for United States military personnel and retirees, and is expected to process 100 percent of all claims after a recent challenge to its bid for the remaining West Coast claims is settled. BCBS also administers about 28 percent of all Medi-

care business nationally, and about 70 percent of all Medicare claims run through its data center. BCBS processes about 1 billion total claims each year and cuts checks amounting to about \$1 billion a day in health care payments.

The region is also home to the nation's second largest supplemental insurance company, Colonial Life. Aflac, the nation's largest supplemental insurance company, purchased Columbia-based Continental American Insurance Company in 2009. Aflac expects to employ at least 825 people in the region by the end of 2012. Other insurance related companies in the region include EagleEye Analytics, Dove Tail, and NetComp.

There are five goals that have been established for the sector to help achieve its mission of increasing the competitiveness of insurance technology in South Carolina:

- Attracting and retaining high quality professionals with technical and/or insurance industry experience to the region by promoting the advantages of living and working in the area.
- Assisting insurance technologies to identify, grow, and source local talent by collaborating with the educational and workforce development community through curriculum development, internships, and student engagement activities.
- Creating a business and regulatory environment where insurance technology and services companies have a competitive edge by communicating the value of the industry to economic development, governmental, and higher education organizations throughout the state.
- Supporting innovation within the industry by establishing collaborations with statewide research institutions to help companies develop more competitive products and services.
- Promoting the region as a center of excellence in insurance technology and services to help companies attract both talent and new business opportunities.

NUCLEAR

The nuclear cluster collaboratively strengthens workforce, services, products, and policies to capture and extend the region's global leadership in nuclear energy capabilities.

The nuclear energy sector was not promoted well in the past 30 years and now the industry faces a figurative and literal generation gap. Outdated technology has left the sector ill-equipped to address the area's growing energy needs and hindered efficiency. With an aging workforce beginning to exit the field – some 50 percent of the industry's engineers, technicians, and laborers are expected to retire in the coming years – companies now anticipate a new generation to move the industry forward.

Adding to the challenges of the nuclear cluster are the 2011 nuclear meltdowns at the Fukushima Daiichi nuclear plant in Japan. The meltdowns occurred after a massive earthquake and tsunami struck the area and sparked a sequence of equipment failures and meltdowns. This event exposed thousands of people to radiation in a village that remains empty. As the news of

Fukushima spread, global concerns about nuclear safety suddenly reached heights not seen since 1986, when the Soviet Union's Chernobyl catastrophe caused tens of thousands of deaths.

- **\$10 billion in capital investment expected within Columbia MSA by 2025**
- **opportunity to establish leadership in emerging nuclear technologies**
- **NuHub launched in 2010 as coordinating entity**

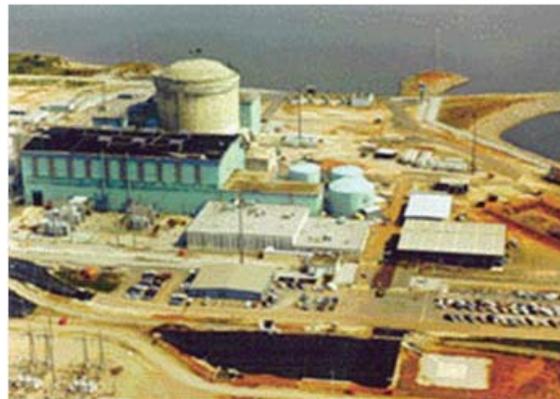
Meanwhile, another obstacle to nuclear expansion is the plummeting price of natural gas. In the past year, the price of natural gas has dropped about 40 percent, reaching a 10-year low. That has prompted several companies to shift investment to natural gas and away from nuclear energy.

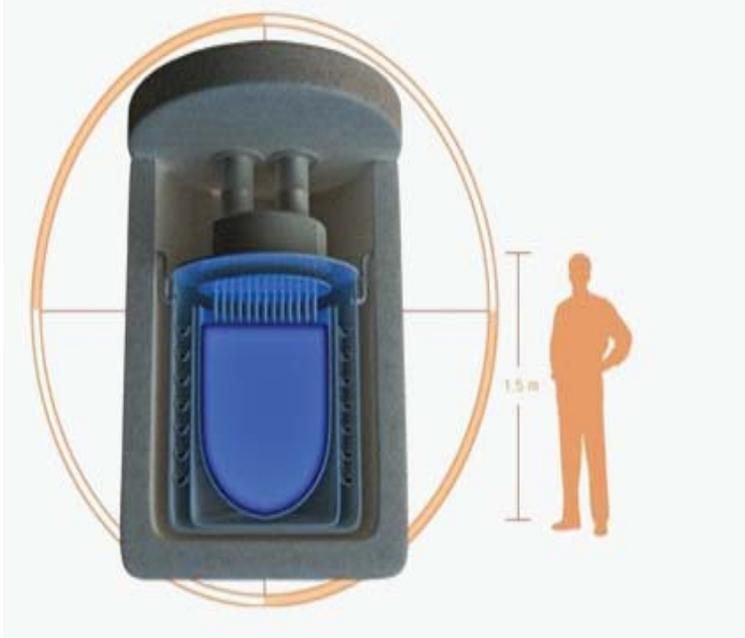
In addition to safety, cost concerns and the price of natural gas, nuclear power continues to be challenged by the issue of where to safely store nuclear waste. Waste is currently stored on site at the country's 104 nuclear plants but those storage facilities were intended to be temporary. A permanent location has yet to be determined after plans to locate waste at Nevada's Yucca Mountain have been indefinitely postponed primarily due to national, state and local political differences of opinion.

Approximately 75% of new planned reactors in the United States are found in the Southeast Corridor. Six new plants are currently in the works across the Carolinas alone, meaning the greatest immediate potential exists in the areas of plant construction and maintenance. More importantly to the economy of the Carolinas, companies such as SCE&G are looking specifically to local suppliers to fill their needs at sites like V. C. Summer, located in Fairfield County, which has already broken ground on one new reactor and is planning another. When these new reactors come online in the coming years, the need will expand for qualified technicians and engineers.

**V.C. Summer
Nuclear Plant**

A new concept in nuclear technology is small modular reactors (SMRs). SMRs are approximately one-third the size of current nuclear plants, have compact designs that are expected to offer a host of safety, siting, construction and economic benefits. Specifically, they could be made in factories and transported to sites where they would be ready to "plug and play" upon arrival, reducing both capital costs and construction times. The small size also makes SMRs ideal for small electric grids and for loca-





tions that cannot support large reactors, providing utilities with the flexibility to scale production as demand changes.

In concept, small modular reactors would be built in a factory, be of a size and weight that could be transported on a rail car or large truck, and have power generation capacity of 300 megawatts or less. For comparison, the two Westinghouse AP1000 reactors being built in Fairfield County by the South Carolina Electric and Gas Co. are about 1,110 megawatts apiece.

Potential manufacturers of the SMRs include Westinghouse Electric Co., which already has a nuclear fuel manufacturing plant in Columbia. Westinghouse has said they hope to be the first to market with the most economic small modular reactor. Midlands officials working through a recently formed nuclear collaborative (NuHub), hopes to partner with one of the SMR designers to increase the chance that a demonstration project will land in the region. Potential partners may include a university, an electric utility, the Savannah River National Laboratory and other companies that are engaged in the nuclear power industry. South Carolina Electric & Gas Co., which operates the V.C. Summer nuclear station in Fairfield County, is also interested in participating in an SMR demonstration project.

HYDROGEN AND FUEL CELLS

In March 2006, the City of Columbia adopted a resolution supporting the city’s objective to become a leader in fuel cell innovation. They also created the Columbia Fuel Cell District. The vision for the Fuel Cell District is to assemble the talent and assets required to build a fuel cell cluster that will foster economic prosperity for the region, focusing on an “innovation pipeline” from discovery to development to deployment. Columbia has existing research strengths in fuel cells at the University of South Carolina, the focus and collaboration of the region’s political, business and academic leaders, and resources to implement the vision. The project hopes to integrate education and outreach programs, hydrogen production sites, storage and distribution locations including fueling stations, and

The region is a world class center for innovation with:

- **\$50M+ in research funding**
- **8 new startup companies**
- **3 new landing parties**
- **over 40 industry partnerships**
- **a top five fuel cell states designation**

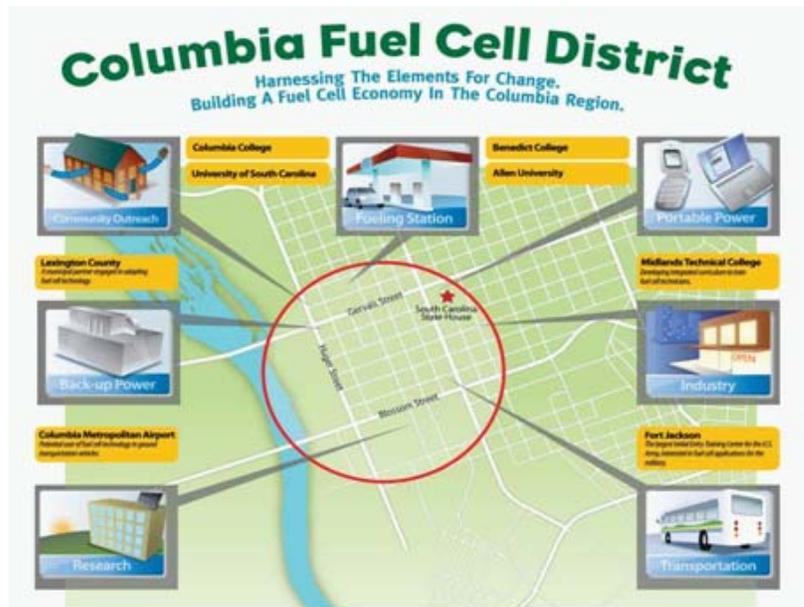
multiple end-use applications to create the nation's first end to end fuel cell district.

In June 2007, South Carolina passed the Hydrogen Infrastructure Development Act (S. 243). The Act's purpose is to "further the creation of a sustainable foundation upon which a hydrogen economy may develop across the State." It provided up to \$15 million over three years to leveraged with other government and private industry funds to advance the commercializa-

tion of hydrogen and fuel cell technologies; to encourage the development of partnerships between state groups and others outside the state; and to promote hydrogen and fuel cell development and usage in the state.

These and other related efforts led to the identification of Hydrogen and Fuel Cells as a target for cluster development in the region. The Hydrogen and Fuel Cells Cluster aims to position the area as a preeminent leader and innovator in fuel cell technology. It is focused on research and commercialization activities required to enable South Carolina to gain economic benefit from its hydrogen and fuel cell research assets. The most intense South Carolina hydrogen and fuel cell research and development activity is in Columbia and Aiken, where local governments have joined with research institutions to build research and commercialization facilities to attract talent and companies to the state.

The University of South Carolina, the City of Columbia, EngenuitySC, and the SCRA have created the Fuel Cell Collaborative to leverage the Midlands region's cleantech assets. The Collaborative has already attracted top fuel cell scientists, entrepreneurs, and innovators. It has assisted in the creation of start-ups such as Trulite, Inc, Boroscience International, and Hydrogen Hybrid Mobility. Initiatives have included genesis of the nation's first Nation Science Foundation funded center for fuel cells, one of the first hydrogen fueling stations, a top tier fuel cell training facility at Midlands Technical College, and the first fuel cell manufacturing facility in the state.



CENTRAL SC ALLIANCE CLUSTERS

The Central SC Alliance partners with many different types of companies to facilitate economic expansion. They believe in encouraging the development of a variety of industries while recognizing that business and industrial clusters can change quickly and be generated suddenly depending on the amount and type of investments being made in the region. With that in mind, the Alliance recognizes the following as target or cluster industries:

Advanced Manufacturing

Advanced Manufacturing is the accelerated use of high-tech processes in the manufacturing plant. This is not the same as “high-tech manufacturing,” because the emphasis is on the high-tech process used in production, rather than the output of high-tech products. Some of the region’s most notable advanced manufacturing companies include: Caterpillar, Eastman Chemical, Haier, Federal Mogul, FN Manufacturing, Michelin and ZEUS.

Subsectors of the Advanced Manufacturing industry:

- Automotive
- Aerospace
- Composites
- Food Processing
- Medical Device Manufacturing

Energy

Central South Carolina’s leaders in energy are focused primarily on nuclear power and renewable energy. SCANA and the area’s Electric Co-ops investments in these areas have resulted in SC being ranked as the nation’s third highest nuclear energy generating state. USC’s Innovista is developing future fuel cell technology and—along with the fuel cell collaborative—constructed one of the first hydrogen fueling stations in the southeast.

Subsectors of the Energy industry:

- Nuclear
- Renewable Energy

Shared Services

Central SC has become a prime location for information technology, insurance, and customer service centers. Organizations are seeking to bridge the gap between information technology industry needs and workforce skills. Verizon located their largest customer service center in the region, Staples centralized their financial support services here, and Intel develops telecommunications server technology in the region.

Subsectors of the Shared Services industry:

- Information Technology
- Finance

- Insurance
- Customer Service

Transportation, Distribution and Logistics

The region has four interstates for easy north/south and east/west access, two class one railways, a metropolitan airport, and is within easy driving distance to the Charleston Port. Ball State University's Bureau of Business Research recently ranked South Carolina 5th in the nation for "Global Reach," and 8th in the nation for "Demand Adaptability."

Subsectors of the Transportation, Distribution, and Logistics industry:

- 3PLs
- Big Box Distributors

Research and Development

The region's Centers for Economic Excellence—a partnership between the state's research universities and industrial companies to create specialized research professorships--are developing new technologies that range from polymer composites to marine genomics. The Army's largest and most active Initial Entry Training Center in the U.S., at Fort Jackson has made Central SC a major area for defense-related research and development. The University of South Carolina's Innovista Research Campus is home to nearly 50 research laboratories, high-tech equipment, and a well regarded faculty.

Subsectors of the Research and Development industry:

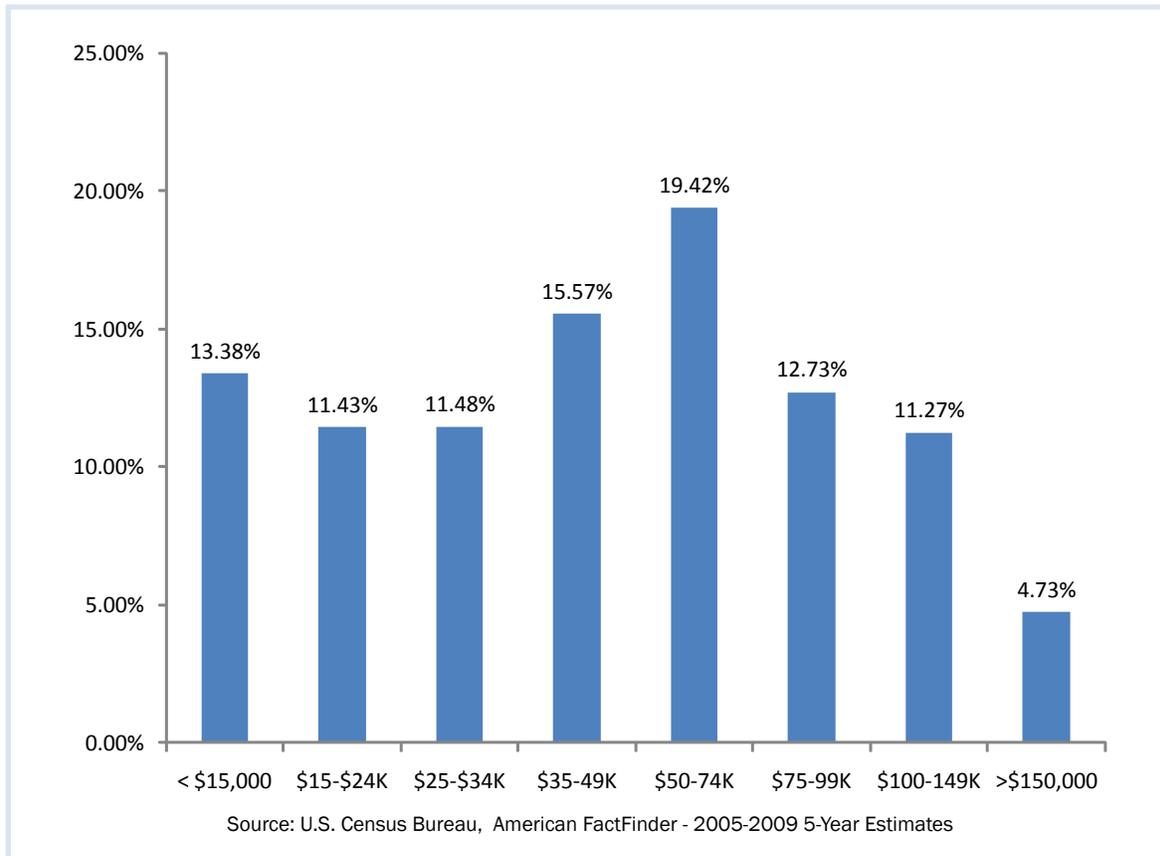
- Defense
- Technology & Software

INCOME AND WAGES

The latest estimates available shows over half the households in the area (51.86%) earn less than \$50,000 per year (Figure 5.28). When examined at the individual county level, there is significant disparity among the four counties. The majority of Fairfield County households, 4,427, earn less than \$35,000 per year while the majority of Lexington County households, 47,009, earn more than \$50,000 per year. This disparity reflects the differences between the urban counties, Lexington and Richland, and the rural counties, Newberry and Fairfield. In urban areas there are typically greater job opportunities and higher pay scales while the opposite is true in rural counties.

Per capita income or income per person is a measure of mean (average) income within an economic aggregate. It is calculated by taking a measure of all sources of income in the aggregate and dividing it by the total population. It does not attempt to reflect the distribution of income or wealth.

Figure 5.28 – Household Income Levels – CMCOG Region



Per capita income is often used as a measure of the wealth of the population. It is useful because it is widely known and produces a straightforward statistic for comparison.

Figure 5.29 shows the per capita income across the region from 1970 to 2009. Dramatic increases in per capita income have occurred over this time span. Each county has consistently ranked about the same when compared to the other counties throughout the time frame with Fairfield and Newberry Counties ranking consistently as the two lowest and Richland and Lexington the two highest.

Wages constitute the largest component of income. At \$39,125, the average wage per job in the region is nearly one percent above the state as a whole (\$38,821). As shown in Figure 5.30, since 1990, the average wage per job in the region has increased at a slightly faster rate (99%) than statewide (98%). Within the region, the average wage per job is highest in Fairfield County (\$44,857) and lowest in Newberry County (\$32,614). These statistics may be attributed to the nuclear and related jobs in Fairfield County as opposed to a broader mix of occupations in Newberry County.

Figure 5.31 presents average weekly wages by industry. In several industries the region's average yearly wage is significantly less than the SC average rate. This is due to the average being generated by a comparison of all four counties, 2 urban and 2 rural. When examined at the individual county level, there are distinct differences among the yearly rates. For example, Richland County exceeds the SC average in every sector. Lexington County exceeds the SC average in 5 out of the 11 industries and is very close in several others. Conversely, Fairfield County is below the SC average in every industry except Manufacturing. Newberry County is also below the SC average in every category except Information. These numbers reiterate the differences between the urban and rural economic conditions in the region.

Figure 5.29: CMCOG Region Per Capita Personal Income 1970-2009

	1970	1980	1990	2000	2009	1990-2009 % Change
Fairfield County	\$2,162	\$6,990	\$12,920	\$20,387	\$27,395	112%
Lexington County	3,628	8,604	18,428	29,981	35,773	94%
Newberry County	2,972	7,976	13,598	20,841	28,447	109%
Richland County	3,448	8,632	17,916	27,830	36,302	102%
Reg. Average	3,053	8,051	15,716	24,760	31,979	103%
South Carolina	\$3,055	\$7,736	\$15,844	\$25,076	\$31,646	100%

Source: U.S. Department of Commerce – Bureau of Economic Analysis

Figure 5.30: CMCOG Region Average Wage per Job 1970-2010

	1970	1980	1990	2000	2010	1990-2010 % Change
Fairfield County	\$4,156	\$12,153	\$22,755	\$34,879	\$44,857	97%
Lexington County	5,162	11,320	19,460	27,437	36,318	87%
Newberry County	4,202	9,760	15,715	23,866	32,614	108%
Richland County	5,728	12,134	20,670	29,896	42,710	107%
Reg. Average	4,812	11,342	19,650	29,020	39,125	99%
South Carolina	\$5,247	\$11,485	\$19,577	\$28,207	\$38,821	98%

Source: U.S. Department of Commerce – Bureau of Economic Analysis

Figure 5.31: CMCOG Region Annual Wage Rates for Selected Industries, 2010

	CMCOG Region	South Carolina	Region vs. State
Agriculture, Forestry, Fishing and Hunting	\$31,776	\$28,725	+10.6%
Construction	\$38,720	\$41,030	-5.6%
Manufacturing	\$46,493	\$49,568	-6.2%
Wholesale Trade	\$46,875	\$54,485	-13.9%
Retail Trade	\$22,960	\$24,455	-6.1%
Transportation & Warehousing	\$39,544	\$37,715	+4.8%
Information	\$55,267	\$50,670	+9%
Finance and Insurance	\$42,016	\$52,714	-20.2%
Healthcare & Social Assistance	\$35,735	\$40,268	-11.2%
Accommodations & Food Services	\$12,422	\$15,043	-17.4%
Public Administration	\$37,240	\$44,143	-15.6%

Source: U.S. Bureau of Labor Statistics – Quarterly Census of Employment & Wages

LABOR FORCE

As of March 2012, the region supports an estimated labor force of 346,231 workers (Figure 5.32). Of this total labor force, approximately 318,159 are employed. The unemployment rate for the area as of February/March 2012 (9.5%) was higher than the statewide rate (8.7%) and higher than the U.S. as a whole. The region’s average unemployment rate has been higher than the U.S. rate in past decade and has fluctuated between being higher and lower than the statewide rate since 2000 (Figure 5.33).

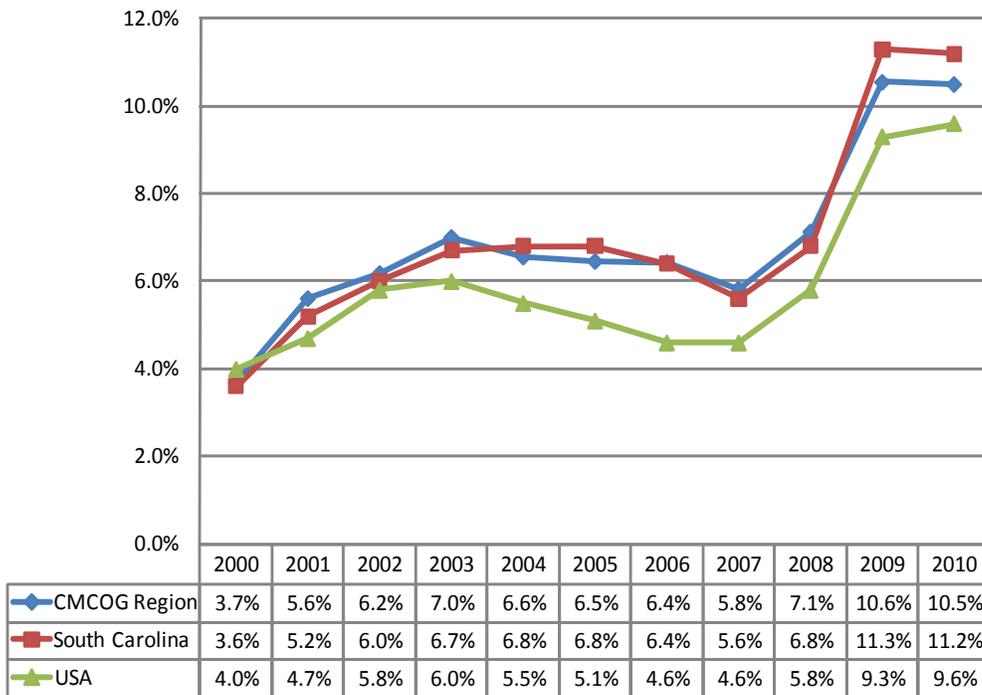
Once again, when examined at the individual county level, there are distinct differences among the yearly rates (Figure 5.34). Lexington County’s unemployment rate was below the S.C. and U.S. rates every year from 2000-2010 with the exception of 2006 when the rate was 4.6% - less than the S.C. rate but equal to the U.S. rate. Richland County’s rate was below the U.S. rate every year from 2000-2010 but equaled or exceeded the U.S. rate from 2004-2010. Conversely, Fairfield County’s unemployment rate exceeded both the S.C. and U.S. rates every year from 2000-2010. Newberry County’s rate exceeded the U.S. rate every year from 2000-2010 and exceeded the S.C. rate every year except 2006 and 2007 when it equaled the S.C. rate and 2010 when it was less than the S.C. rate.

Figure 5.32: CMCOG Region and SC Labor Force Estimates, March 2012

	CMCOG Region	South Carolina
Civilian Labor Force	346,231	2,140,987
Employed	318,159	1,954,538
Unemployed	28,072	186,449
Unemployment Rate	9.5%	8.7%

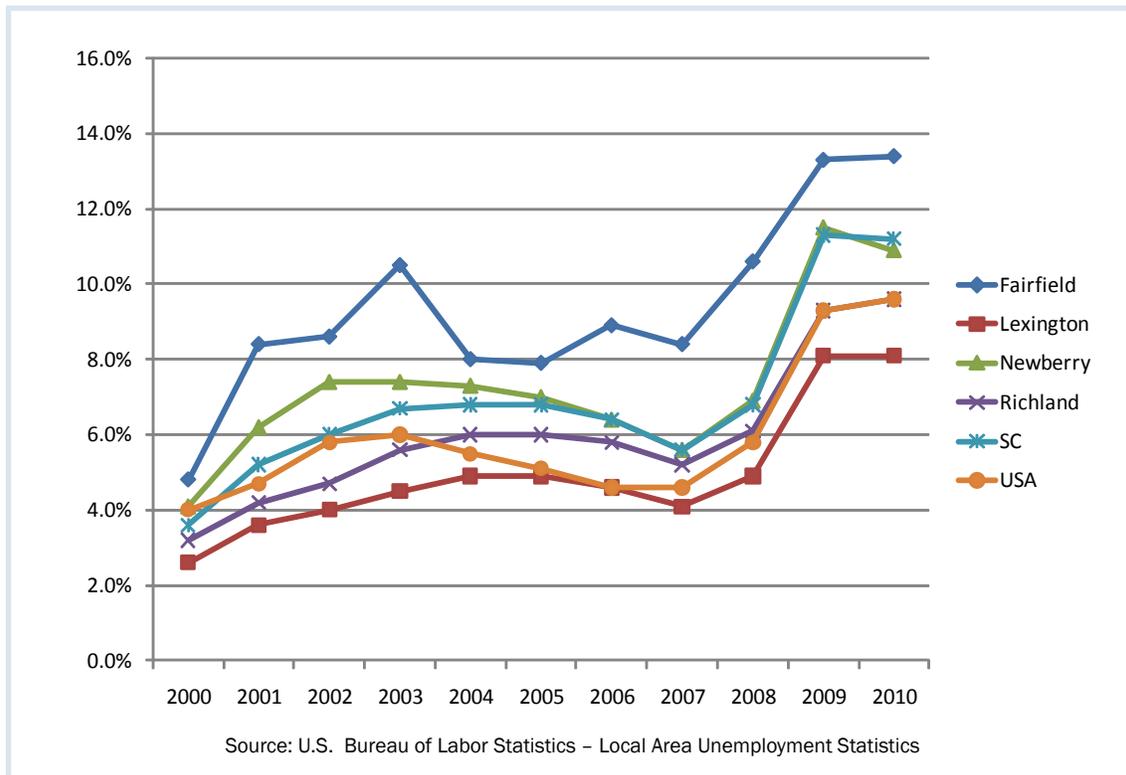
Source: S.C. Department of Employment & Workforce – SC Works Online Services

Figure 5.33: Unemployment Rates CMCOG Region, SC, USA (2000-2010)



Source: U.S. Bureau of Labor Statistics – Local Area Unemployment Statistics

Figure 5.34: Unemployment Rates CMCOG Counties, SC, USA (2000-2010)



PROJECTED JOB GROWTH

The region’s economy was built on traditional industries such as manufacturing, which remains a critical sector. Changes in the regional economy have made growth industries such as health care, social services as well as finance and information technology the areas in which job creation will occur. These industries will play an increasing role in the area’s employment picture over the next decade.

The following analysis of projected job growth is based on the SC Department of Employment and Workforce’s (SCDEW) projections to 2018. The analysis is at the Workforce Investment Area (WIA) level as defined by the SCDEW. The Midlands WIA includes Fairfield, Lexington and Richland Counties. The Upper Savannah WIA includes Abbeville, Edgefield, Greenwood, Laurens, McCormick, Newberry, & Saluda Counties. For analysis purposes, the WIAs must be examined separately because Newberry County is within the Upper Savannah WIA instead of the Midlands WIA. SCDEW projects approximately 36,847 new jobs in the region through 2018.

MIDLANDS WIA

Fastest Growing Occupations

The fast-growing occupations will have better employment prospects than occupations with slow or declining employment. Most of the annual job openings will result from both the need to replace the workers who change jobs and new job creation. The majority of new job openings in the Midlands WIA through 2018 will be in the Retail Sales and Health Diagnosing and Treating Practitioners fields (Figure 5.35).

Total Industry Growth

Growth by industry sector is detailed in Figure 5.36. The Education and Health Services and Trade, Transportation and Utilities will account for the majority of industry growth. Combined, these two sectors will contribute a projected 21,888 new jobs through 2018.

Figure 5.35:
Jobs with the
Most Openings
Through 2018 –
Midlands WIA

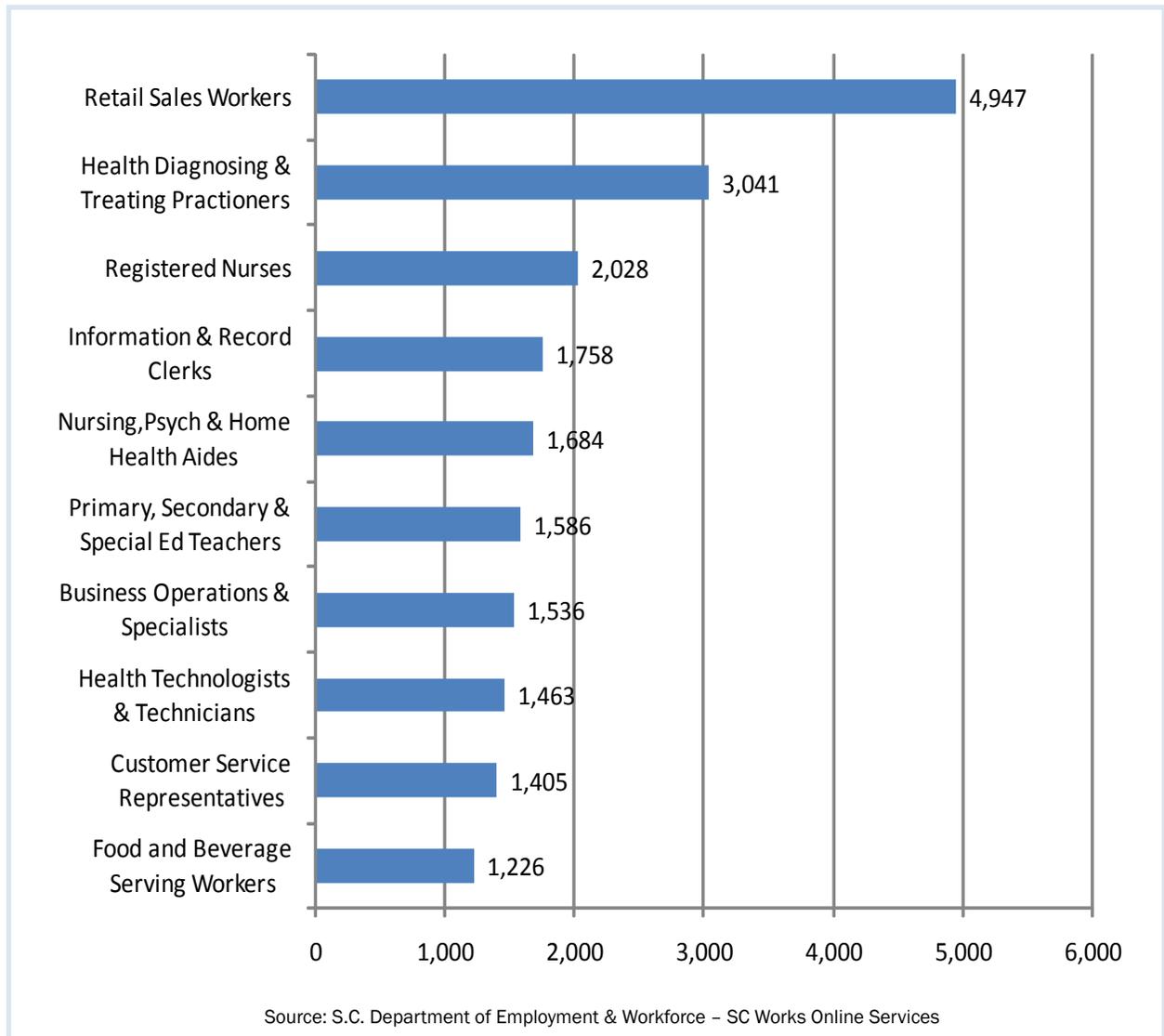


Figure 5.36: Growth by Industry Sectors Through 2018 – Midlands WIA

Sector	2008 Estimated Employment	2018 Projected Employment	2008-2018 Change	% Change 2008-2018
Education & Health Services	73,039	88,017	14,978	20.5%
Trade, Transportation & Utilities	60,612	67,522	6,910	11.4%
Professional & Business Services	36,737	41,816	5,079	13.8%
Financial Activities	27,452	30,512	3,060	11.1%
Leisure & Hospitality	29,500	32,138	2,638	8.9%
Other Services	14,881	16,972	2,091	14.1%
Construction	16,329	18,293	1,964	12.0%
Public Administration	36,618	37,015	397	1.1%
Information	5,380	5,189	-191	-3.6%
Natural Resources & Mining	2,768	2,340	-428	-15.5%
Manufacturing	23,581	22,003	-1,578	-6.7%

Source: S.C. Department of Employment & Workforce – SC Works Online Services

UPPER SAVANNAH WIA

Fastest Growing Occupations

The majority of new job openings in the Upper Savannah WIA through 2018 will be in the Food Processing and Health Diagnosing and Treating Practitioners fields (Figure 5.37). The fastest growing occupations differ widely in educational requirements beyond high school and in average pay with many jobs paying around minimum wage and others paying significantly more.

Total Industry Growth

Industry growth sectors in the Upper Savannah WIA area is detailed in Figure 5.38. The Education and Health Services and Professional and Business Services will account for the majority of industry growth. Combined, these two sectors will contribute a projected 2,475 new jobs through 2018.

DECLINING INDUSTRIES

Also included in SCDEW’s job projections are industries that are in decline. Job losses in the Midlands WIA and the Upper Savannah WIA are projected in several sectors as shown in Figures 5.39 and 5.40.

Figure 52: Jobs with the Most Openings Through 2018 – Upper Savannah WIA

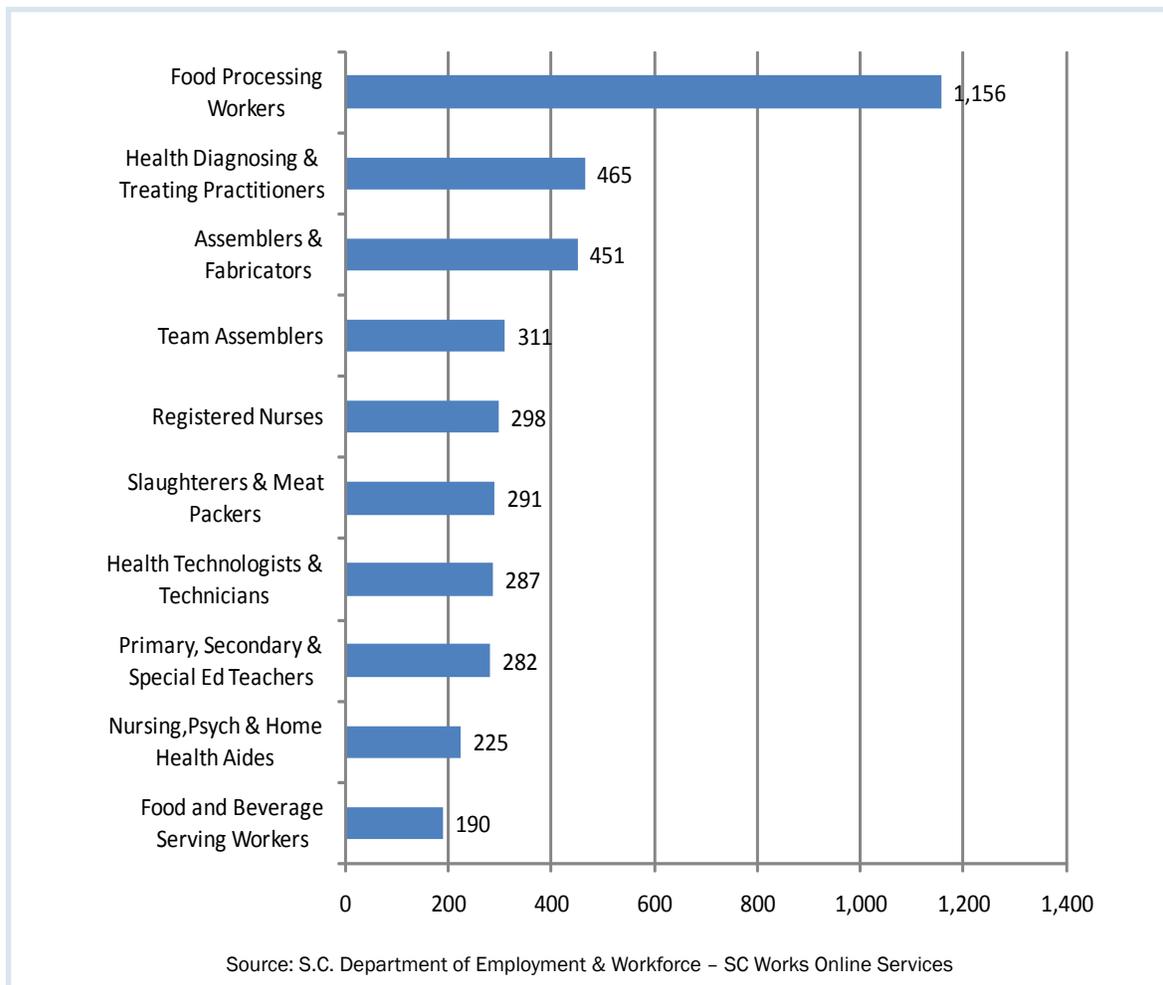


Figure 53 – Growth by Industry Sectors Through 2018 – Upper Savannah WIA

Sector	2008 Estimated Employment	2018 Projected Employment	2008-2018 Change	% Change 2008-2018
Education & Health Services	17,908	19,592	1,684	9.4%
Professional & Business Services	4,520	5,311	791	17.5%
Trade, Transportation & Utilities	11,913	12,544	631	5.3%
Manufacturing	21,776	22,321	545	2.5%
Leisure & Hospitality	5,783	6,042	259	4.5%
Public Administration	8,876	9,098	222	2.5%
Construction	3,493	3,675	182	5.2%
Information	725	828	103	14.2%
Financial Activities	1,780	1,808	28	1.6%
Other Services	3,213	3,049	-164	-5.1%
Natural Resources & Mining	4,328	3,532	-796	-18.4%

Source: S.C. Department of Employment & Workforce – SC Works Online Services

Figure 54 – Declining Industry Employment Through 2018 – Midlands WIA

Sector	2008 Estimated Employment	2018 Projected Employment	2008-2018 Change	% Change 2008-2018
Manufacturing	23,581	22,003	-1,578	-6.7%
Agriculture	2,502	2,100	-402	-16.1%
Information	5,380	5,189	-191	-3.6%
Mining	266	240	-26	-9.8%

Source: S.C. Department of Employment & Workforce – SC Works Online Services

Figure 55 – Declining Industry Employment Through 2018 – Upper Savannah WIA

Sector	2008 Estimated Employment	2018 Projected Employment	2008-2018 Change	% Change 2008-2018
Agriculture	4,280	3,479	-801	-18.7%
Utilities	260	224	-36	-13.8%
Finance & Insurance	1,390	1,366	-24	-1.7%
Transportation & Warehousing	2,578	2,567	-11	-0.4%

Source: S.C. Department of Employment & Workforce – SC Works Online Services

PLANNED JOB CREATING PROJECTS

V.C. SUMMER EXPANSION

In 2008, South Carolina Electric and Gas (SCE&G) submitted an application to the Nuclear Regulatory Commission to build two new nuclear reactors at the Virgil C. Summer Nuclear Generating Station in Fairfield County, South Carolina. Approval was issued on March 30, 2012.

The existing reactor at V.C. Summer is already the largest employer in Fairfield County with over 600 full time employees. Site preparation at the V.C. Summer plant is already underway and the two units are scheduled to go online in 2016 and 2019, adding 3,000 to 5,000 construction jobs and 600 to 800 permanent operations jobs.

Upon completion of the two new reactors, the combined V.C. Summer plant will be capable of generating 3,200 Mega Watts (MW) of emission-free electricity, enough to power 2,240,000 homes in South Carolina. Total projected cost to build the two reactors is estimated at \$9.8 billion.

NEPHRON PHARMACEUTICALS

In October 2011, Nephron Pharmaceuticals announced their plans to build a \$313 million pharmaceutical plant, including research and development facilities, on a 60-acre parcel in Lexington County, south of Interstate 77 near Cayce. The investment is expected to generate 707 new jobs. The company is developing three new drug products for ophthalmology, expanding their product range from their traditional specialty in respiratory medications. The plant should be turning out products in about two and a half years, about the shortest period that can be expected including construction, outfitting the plant and winning FDA approvals to start operations. The S.C. Department of Commerce committed an economic development set aside grant of \$4.5 million for site preparation and infrastructure. The company was also approved for job development credits, which will be available when hiring targets are met. The company will receive training support from the state's ReadySC program. Nephron Pharmaceuticals Corporation is a global leader in manufacturing generic respiratory medications. The company's products are available to retail pharmacies, hospitals, home care companies, long term care facilities, mail order pharmacies, and various other customers.



V.C. Summer Nuclear Plant -
Jenkinsville

MICHELIN

In April 2012, Michelin, South Carolina's largest manufacturer announced an expansion to their Lexington and Anderson County facilities. The company plans to expand its Earthmover tire production with a \$750 million investment expected to generate 500 new jobs. In May 2011 Michelin announced a \$200 million investment to its Lexington County facility to further expand its tire building capacity. The tire maker has previously invested more than \$1 billion in the site since it was first established in 1981. This expansion, for which all equipment will be installed by the first half of 2013, will create 270 new jobs, phased in over the next two years.

CATERPILLAR

In March 2010, Caterpillar announced plans to increase operations at its facility in Newberry County. The expansion plans are underway and should be completed in upcoming years. The company expects employment at the Newberry facility to increase by about 500 people as a result of the capacity expansion project. Caterpillar is making a multi-year, significant capital investment in support of the Newberry expansion plan. The company opened the Newberry generator set facility in 2006 as part of Caterpillar's Electric Power Division.



Caterpillar Plant,
Newberry, SC

WNS

In May 2012, WNS, a leading provider of global Business Process Outsourcing (BPO) services, announced plans to establish new operations in Richland County with a delivery center located in Columbia, the company's first in North America. The new delivery center, with 23,000 square feet of office space plans to start operations in July 2012. WNS serves 200+ global clients with expertise in key industry verticals including Travel, Insurance, Banking and Financial Services, Manufacturing, Retail and Consumer Packaged Goods, Shipping and Logistics and Healthcare and Utilities. WNS delivers business process outsourcing services such as finance and accounting, customer care, technology solutions, research and analytics and industry specific back office and front office processes.





6

ANALYSIS AND ASSESMENT

INTRODUCTION

Developing and maintaining a healthy economy requires an understanding of the underlying structures that contribute to individual sectors. To actively recruit profit margin sensitive industries, local and state taxes must be examined to determine if they are substantially higher than other localities. Similarly, to recruit and retain businesses, highway infrastructure must be assessed to determine its limitations and conditions. Matching economic resources with the right recruitment and retention strategy is vital to economic development efforts.

This section examines the region’s economic growth potential by assessing a range of variables businesses use to make location decisions. According to *Area Development Online Site and Facility Planning’s* results from their latest corporate surveys, the following factors (in priority order) were identified in making a site selection (Figure 6.1).

In *Area Development’s* corporate survey, quality-of-life factors are ranked separately from the other site selection factors and are generally considered lower in importance than the top site selection factors — except for “low crime rate.” Low crime rate is historically considered the primary quality-of-life concern as borne out by the survey’s 25-year history. From the latest survey, the following quality of life factors (in priority order) were identified in making a site selection (Figure 6.2).

Figure 6.1 : Top Site Selection Factors – Area Development Corporate Survey 2010

Site Selection Factor	Site Selection Factor
1. Highway accessibility	14. Availability of advanced ICT services
2. Labor costs	15. Expedited or “fast-track” permitting
3. Tax exemptions	16. Right-to-work state
4. Occupancy or construction costs	17. Proximity to major markets
5. Sates and local incentives	18. Proximity to suppliers
6. Corporate tax rate	19. Raw materials availability
7. Availability of skilled labor	20. Availability of long-term financing
8. Inbound/outbound shipping costs	21. Training programs
9. Energy availability and costs	22. Accessibility to major airport
10. Availability of buildings	23. Availability of unskilled labor
11. Low union profile	24. Proximity to technical university
12. Environmental regulations	25. Railroad service
13. Availability of land	26. Waterway or oceanport accessibility

Source: Area Development Online, www.areadevelopment.com

The region’s counties have active economic development programs and expend substantial resources providing assistance to their existing business base. Competition for new businesses is fierce, and local and state incentive packages continue to grow. Increasingly, only communities with substantial incentive packages to offer are successful in attracting major new employers.

Figure 6.2: Top Quality of Life Factors – Area Development Corporate Survey 2010

Quality of Life Factor
1. Low crime rate
2. Healthcare facilities
3. Housing costs
4. Housing availability
5. Ratings of public schools
6. Climate
7. Colleges and universities in area
8. Cultural opportunities
9. Recreational opportunities

Source: Area Development Online, www.areadevelopment.com

The region's manufacturing sector has declined in recent years due to changing markets, corporate downsizing, and free trade. Many low-skill manufacturing jobs have left the region for lower cost locations overseas. Decisions on facility closures or downsizing are generally not made locally and are outside of local control or influence. In most cases, local incentives cannot compete with national or international factors affecting the viability of local facilities.

The outlook for manufacturing may be improving, however, according to recent statements from the Central SC Alliance, the region's primary economic development recruitment agency. According to the Alliance, the greater economic growth rate in China coupled with higher inflation is about to take Chinese production costs up to parity with the U.S. within five years. In other words, they believe that there will be no price advantage in locating manufacturing plants in China in five years instead of in the U.S.

From an industrial/commercial site selection standpoint, the region remains an attractive location. The availability of public infrastructure to support growth is already in place and has sufficient capacity. The region's challenges come from other similar communities throughout the southeast. These areas (for example, Charleston/North Charleston, SC, Greenville/Spartanburg, SC, Augusta, GA) offer many of the same amenities available in the Midlands region, and pursue new investment with the same vigor and focus. Competitors may even view the region's businesses as potential relocation targets for their own efforts.

STRENGTHS, WEAKNESSES, OPPORTUNITIES AND THREATS (SWOT)

A SWOT (strengths, weaknesses, opportunities, and threats) analysis is a method used to systematically gather and analyze information and identify issues and options facing an area. The SWOT analysis provides information that is helpful in matching resources and capabilities to the competitive environment within which a region operates. This framework helps decision-makers focus activities and resources into areas where they can be most effective, and is a key step in crafting an economic diversification strategy.

In October 2011, the CMCOCG Community and Economic Development distributed a survey to obtain opinions on the region's SWOT (Appendix A). The results of the strengths and weaknesses portion of the survey revealed the following (Figures 6.3, 6.4, 6.5):

The survey revealed the following as strengths in the region:

- Transportation network
- Access/proximity to markets
- Local health care facilities
- Attractive, livable communities
- Overall mix of employers
- A well-trained workforce
- Housing options
- Strong existing businesses

In addition to these, discussions with the CEDS Committee and previous SWOT analysis identified some other strengths of the region:

- Surplus of land for industrial use
- Close geographic access to SC Department of Commerce and other State agencies
- Growing population
- A foreign trade zone and a Customs Port of Entry at the Columbia Metropolitan Airport
- Growing military bases
- Fuel cell research and other resources from the University of South Carolina
- Good capacity and location of infrastructure such as natural gas, electric, telecommunications, water and sewer
- Significantly lower cost of living than other metropolitan areas
- Diverse cultural opportunities

The survey revealed the following as weaknesses in the region:

- Community leadership
- Local / regional school system
- Trained workforceLocal resources for capital – business loan funds, etc.
- Economic development organizations
- Tourism assets
- Raw materials / natural resources
- Renewable energy potential (wind, solar, geothermal, hydro, biomass)
- Strength of existing businesses
- Transportation network

In addition to these, discussions with the CEDS Committee, previous SWOT analysis and other comments from the survey identified some other weaknesses of the region:

- Slow, burdensome government processes (permitting, zoning, business licenses, etc.)
- Insufficient community cohesiveness to influence regional location decisions (Southwest Airlines, etc.)
- High energy costs (electrical, etc.) compared to other areas
- Lack of skilled workers for available employment opportunities
- Lack of high school focus on math and engineering related skills
- Lack of K-12 focus on steering young people into occupations with jobs available
- Lack of amenities in region to attract and retain talent pool
- Inadequate number of existing, vacant facilities to attract industry
- Fragmented network of water and sewer providers resulting in areas with inadequate or no capacity for the needs of new or expanding businesses
- Inadequate system of public transportation
- Economic disparity among K-12 public education institutions

The survey revealed the following as potential economic opportunities in the region:

- Proximity to research university
- Access to transportation (air, highway, rail)
- Attractive communities / quality of life
- Population growth
- Available land
- Skilled labor force
- Specific demographic group – students, retirees, etc.
- Availability of water/sewer & other infrastructure resources

- Anchor industries or clusters
- Tourism attractions

In addition to these, discussions with the CEDS Committee and previous SWOT analysis identified some other opportunities of the region:

- Growth in healthcare and related jobs
- Development of alternative energy technology
- Military bases

The survey revealed the following as potential threats in the region:

- Ineffective existing government (local, state, federal)
- Vacant Main streets, town centers, and/or shopping areas
- Lack of access to capital
- Excessive permitting fees and hostile regulatory environment
- Infrastructure deficiencies (road, water/sewer, transmission lines, etc.)
- Declining industries
- Lack of labor force training opportunities
- Lack of “living wage” jobs available
- Willingness of entrepreneurs to start or expand business
- Volatility of business cycle (boom/bust)

In addition to these, discussions with the CEDS Committee and previous SWOT analysis identified some other potential threats to the regional economy:

- Closure of military bases
- Inadequately financed bus system
- Lack of regional bus system serving all four counties
- Uneven suburban development in Lexington and Richland Counties
- Rapid population growth will burden school districts and local governments
- Water supply potentially inadequate for future needs
- Water quality
- Cost of sewer service
- Lack of vacant industrial and speculative buildings
- Decline in State funds to support local governments and higher education institutions

Figure 6.3: Strengths & Weakness by Survey Results

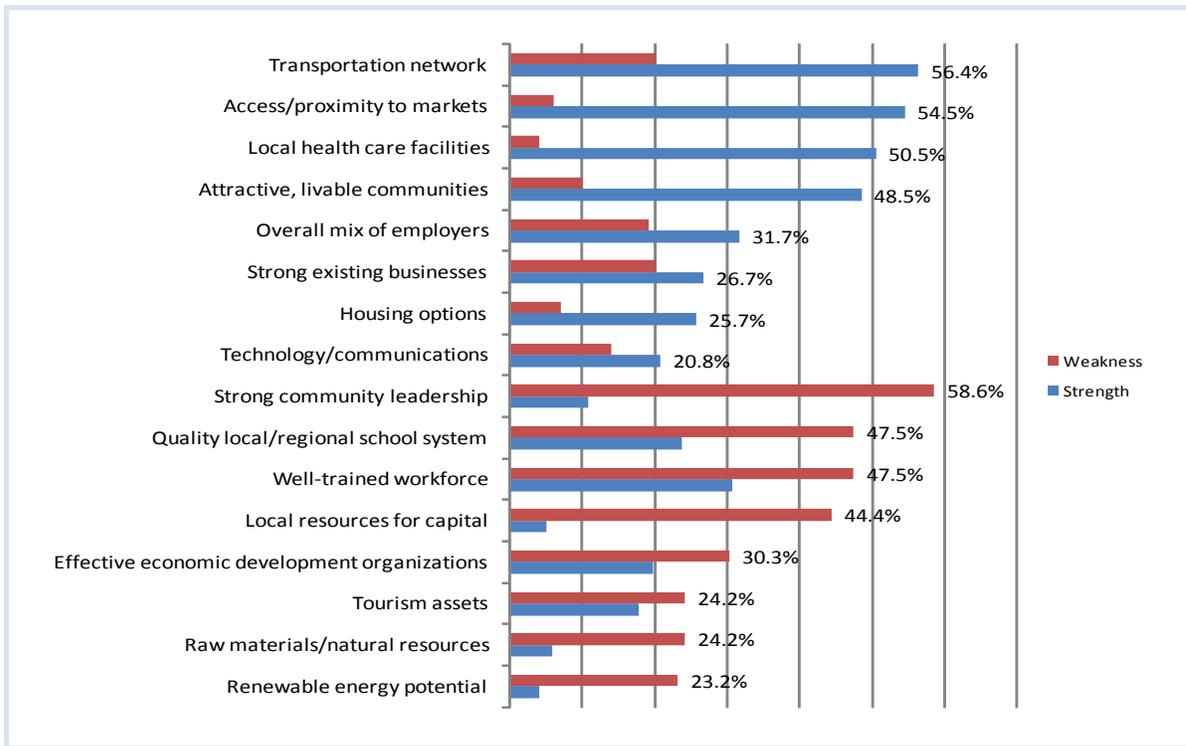


Figure 6.4: Potential Economic Opportunities by Survey Results

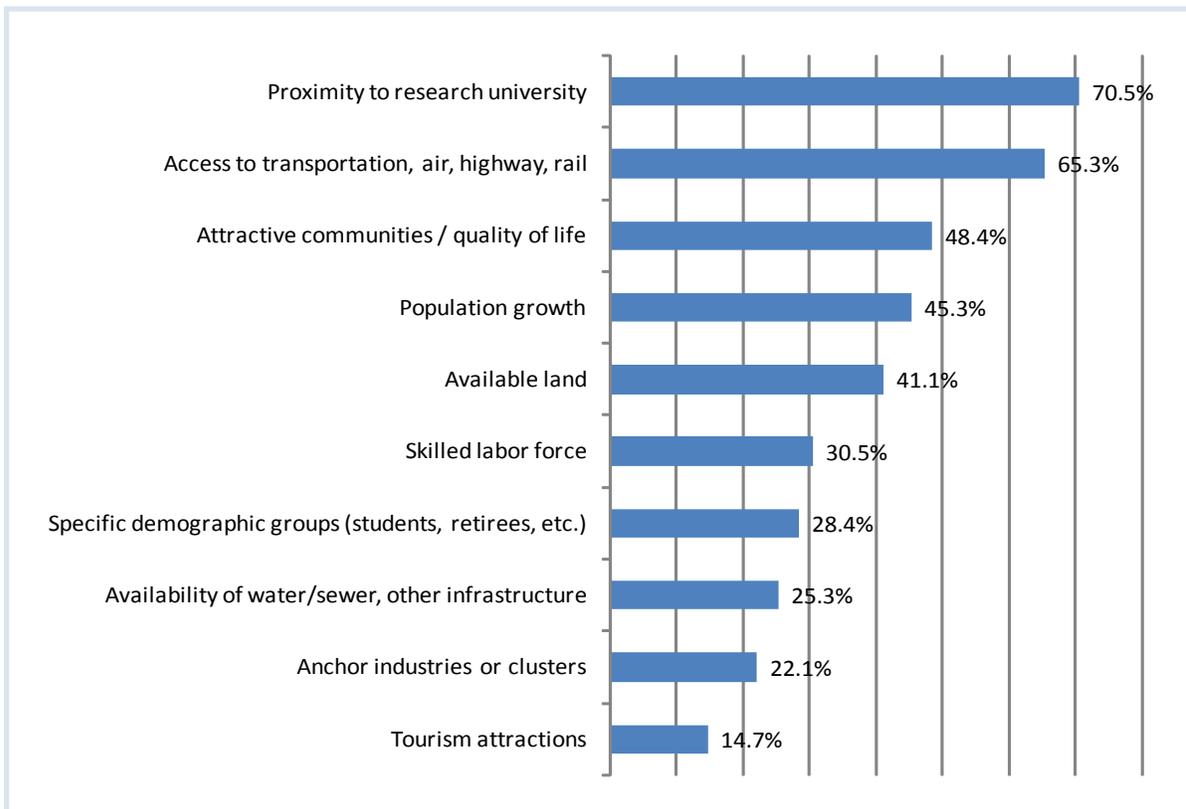
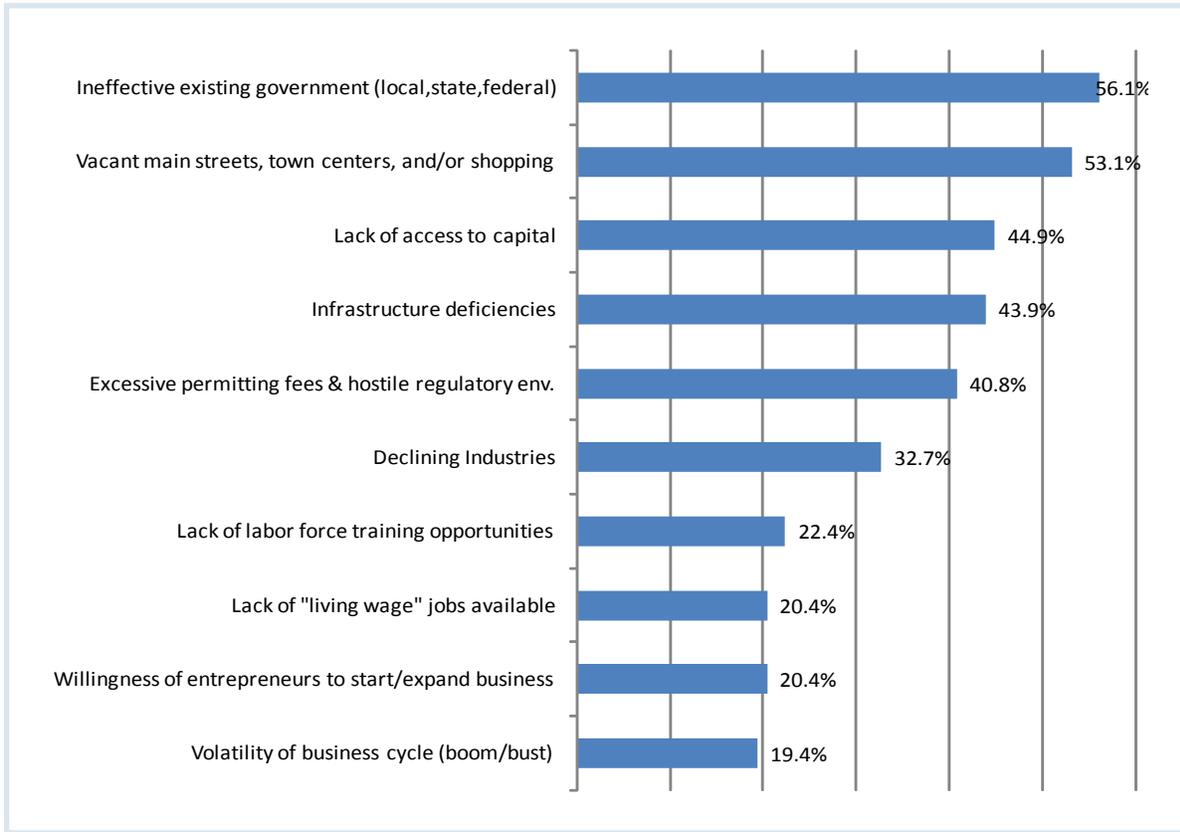


Figure 6.5: Potential Economic Threats by Survey Results



INSTITUTIONAL CAPACITY

A key component of economic development includes understanding the needs of existing businesses. Existing businesses may need training or access to capital in order to finance an expansion. They may require assistance finding skilled employees or in resolving land use issues. They may require knowledge of how to tap into new markets for their products. Institutional capacity measures the extent to which area agencies have the knowledge and skills to provide these and other services to businesses.

In the economic development process, government plays several roles: policy maker, financial partner, and regulator. Local government policy makers are called upon by citizens to balance sometimes competing and conflicting community values and objectives.

DEVELOPMENT AGENCIES

Figure 6.6 identifies multiple development organizations in the region that support economic development initiatives.

Figure 6.6 – CMOG Region Economic Development Organizations

Batesburg-Leesville Chamber of Commerce	www.batesburg-leesvillechamber.org/
Central Midlands Council of Governments	www.centralmidlands.org
Central SC Alliance	www.centalsc.org/
City Center Partnership	www.citycentercolumbia.sc/
City of Columbia Development Gateway	http://columbia.sc.gov/cocextranet/index.cfm/
EngenuitySC	www.engenuitysc.com/
Fairfield County Chamber of Commerce	http://fairfieldchamber.sc/
Fairfield County Economic Development	www.fairfieldsc.com
Greater Chapin Chamber of Commerce	www.chapinchamber.com/
Greater Columbia Chamber of Commerce	www.columbiachamber.com/
Greater Lexington Chamber of Commerce	www.lexingtonsc.org/
Innovista	www.innovista.sc.edu/
Irmo Chamber of Commerce	www.irmochamber.com/
Lexington County Economic Development	www.lexingtoncountyusa.com/
New Carolina	www.newcarolina.org
Newberry County Chamber of Commerce	www.newberrycounty.org/
Newberry County Economic Development	www.newberrycountysc.org
Palmetto Economic Development Corp.	www.scpowerteam.com/
Richland County Economic Development	www.richlandonline.com/
USC Technology Incubator	www.incubator.research.sc.edu
West Metro Chamber of Commerce	http://westmetrochamber.com/

The number of development groups reflects the region’s emphasis on economic development. In the past decade, public and private sector interests in the region have focused increased economic development – particularly on job growth. Gradual losses in traditional manufacturing industries and a declining population base have resulted in concern about the area’s economic future. The decline in sectors such as manufacturing has also placed pressure on the region’s tax base. As economic restructuring occurring on the national and international levels has reduced the number of good paying low-skilled jobs in the manufacturing sector, rural counties have experienced disproportionately higher rates of unemployment.

COUNTY AND CITY GOVERNMENTS

There are a number of ways that municipalities support economic development efforts. First, one of the most significant direct actions municipalities can take is to provide the necessary infrastructure, including:

- Developing long-term facility expansion plans
- Designing specific systems and projects
- Raising or borrowing local funds to finance the projects or act as a conduit for state and federal funds; and
- Forming public-private partnerships to jointly develop projects

Second, municipalities can deliver high quality and cost effective urban services. These necessary services include police and fire protection, parks and recreation, and a well-run land use planning and regulatory process. In addition, municipalities can actively participate in public/private groups designed to help businesses and the development community as they work their way through state and federal regulatory processes.

Third, municipalities can directly impact economic development by conducting market research or by investing in and developing properties. For example, municipalities could develop, maintain, and disseminate data and analysis on local development conditions and trends, and assumptions upon which plans, programs, and strategies are based. In addition, municipalities can buy land, aggregate parcels, and make necessary improvement so that it is ready for new development or redevelopment. For some projects, municipalities (through the use of a development authority) can issue industrial revenue bonds or other tax-free municipal bonds. This also allows joint ventures with private sector partners for appropriate development.

Historic
Newberry
County
Courthouse



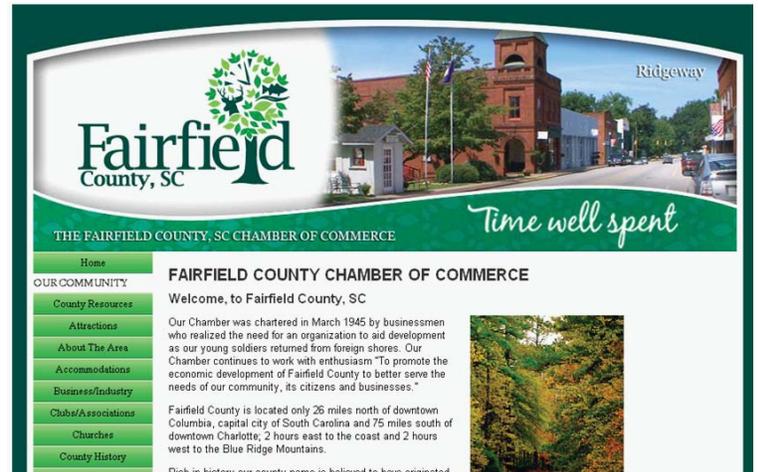
Lastly, municipalities' public investment in urban facilities, such as city/county administrative offices, community centers, and cultural venues can be a factor in inducing further economic development. By targeting a sub-area for an infusion of redevelopment investment and daytime population, nearby businesses may see a greater captive market and also be encouraged to renovate and improve their establishments. Cultural and recreational facilities can have a wide range of economic impact, from simply

attracting residents to a particular part of the city (e.g., downtown business district) more frequently to attracting visitors who will bring new revenue to the local economy through tourist expenditures.

CHAMBERS OF COMMERCE

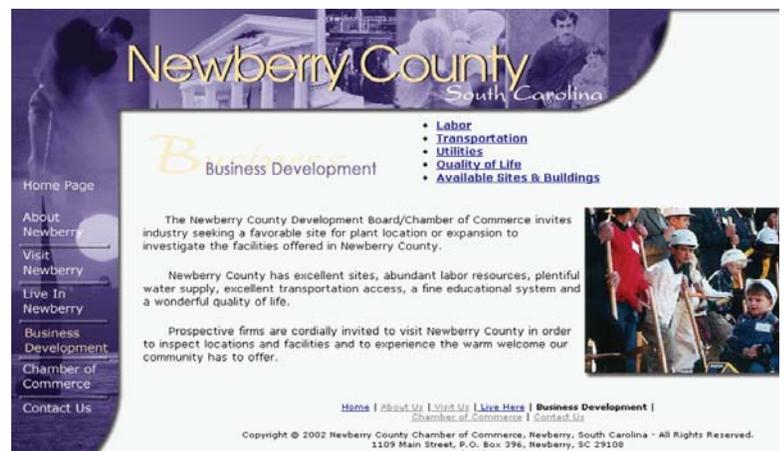
All counties in the region have active Chambers of Commerce, whose membership consists of hundreds of area businesses, and are focused on business promotion, retention and expansion. Traditionally, the Chambers have provided advocacy, support, marketing, services and information for their business members, and resources for start-up and growing businesses. They are the first point of contact for all non-industrial development. Marketing – particularly the dissemination of information on the area - is a major function of area Chambers of Commerce. Most counties have developed chamber websites to provide visitors and potential businesses with information on their respective counties and the support programs they offer.

Fairfield County’s Chamber of Commerce website is typical of other regional chamber websites, and includes information about the chamber, a directory of area businesses and calendar of events. Contact information is provided for potential businesses interested in locating in Fairfield County.



DEVELOPMENT AUTHORITIES

There are a few Development Authorities (AKA Development Boards, Development Corporations, etc.) in the region including the Newberry County Development Board, Columbia Development Corporation, and the Eau Claire Development Corporation. Development Authorities are non-profit industrial/economic development organizations, supported by a broad-based board of directors and their respective local governments. Development Authorities generally work to attract quality businesses to their respective service areas. They provide confidential services to prospective businesses, including technical assistance, employee recruitment and training information, site selection services, financial assistance information, community network assistance, business development information, and retention and expansion services.



Development Authorities have administrative funding and staff resources and are charged with overseeing and coordinating all industrial/economic development activities within their areas. Development Authorities work to create and maintain an inventory of quality industrial and commercial land and buildings sufficient to meet market demand. They also play a key role in advocating for economic development tools, help organize economic development stakeholders, and serve as a liaison with public and private agencies.

Development Authorities provide various types of information on their websites:

(1) Background on their communities (2) Available industrial sites and buildings (3) Aerial and parcel maps of available sites (4) information on water and sewer availability, and (5) incentive programs offered by local and state government programs.

Development authorities have active industrial retention strategies, based primarily on the development of industrial and business parks. They have cleared, prepared and developed tracts of underutilized and vacant land as sites for business location and expansion. These activities are financed by a combination of municipal general obligation bonds and state funds.

The majority of new industrial jobs come from expansion of existing businesses. These businesses are already providing their communities with jobs and tax dollars, are more likely to be responsive to community needs, and retain profits in the community. Promoting and assisting existing businesses is essential to ensure the retention and expansion of these companies.

DOWNTOWN DEVELOPMENT AUTHORITIES

Several areas in the region (Newberry, Columbia Vista, downtown Columbia) have active downtown development authorities (DDA). These were set up with the objective of revitalizing and enhancing distressed areas of their downtowns. Their missions have evolved to support economic development opportunities across a wide range of activities. As independent public units that are governed by a board of directors, DDAs work closely with local government and the private sector to strengthen the economic climate of their downtowns. The DDAs play a leading a coordinated strategy of economic development and civic design.

Marketing through the dissemination of information is relatively modest when compared to chambers of commerce or development authority websites.

REGIONAL DEVELOPMENT AGENCIES

Central Midlands Council of Governments

The CMCOG is an association of cities and counties, designated by federal and state law, to engage in regional planning. Among its many roles, the agency serves as an economic development and policy coordinating body within the region, bringing economic development stakeholders together to articulate a regional voice for economic development policy direction. The CMCOG also seeks funding for economic development projects within the region, including federal grants from the Economic Development Administration (EDA), and coordinates with other parties to find additional funding sources for regional projects. It does not duplicate the activities of local and state operating agencies, but supports their needs with complementary regional-level planning and advocacy, and serves as a data center that collects, analyzes, and disseminates information vital to the citizens and governments in the region.

Central SC Alliance

Central SC is a joint development authority founded in 1994 encompassing all four counties in the CMCOG region. They serve to promote the economic development of the region, encourage cooperation among economic development organizations within the member counties, and exercise all the powers and privileges granted to development authorities pursuant to South Carolina law.

Central SC's primary mission is to recruit capital investment in the region. With the help of its partners and members, they strive to leverage the support of public and private economic development groups, educators and elected officials to foster a business-friendly climate.

Central/SC
Business Friendly. Business Ready.

Property Search | News & Media | Contact Us | Site Map

Target Industries | Incentives & Resources | Quality of Life | About Central SC

Business Friendly. Business Ready.

With the ideal mix of supportive government, low tax rates and competitive incentive packages, this is the business friendly climate that you've been looking for. And with Central SC as your local guide, a company expansion or relocation couldn't be easier.

IS YOUR BUSINESS READY?
> View Business Climate

Business Climate | Workforce | Infrastructure | Major Employers | Quality of Life

Find your next location
PROPERTY SEARCH

STATE GOVERNMENT

The South Carolina Department of Commerce (SCDOC) is focused on supporting business retention, expansion and recruitment through training, technical assistance, and grant programs. It has a strong focus on trade-related industries and oversees a host of other collaborative community efforts.

The South Carolina Department of Transportation (SCDOT) is a key infrastructure provider in the region, and has significant impacts on the area economy. SCDOT works with multiple public and private stakeholders on economic development related projects. The State levies a state gasoline tax, a portion of which is administered by SCDOT, including an authorized grant program to fund local government transportation projects.

The numerous universities, community colleges, technical and vocational institutions, and the K-12 school system in the region lay the critical groundwork for a skilled workforce and a strong regional economy. Their major role in educating the current and future labor force and facilitating research initiatives linked to the private sector is a crucial component to economic vitality in the region.

SC Department of Employment and Workforce (SCDEW)

The availability and quality of the labor force is a primary factor in economic development, particularly in business relocation and expansion. Workforce development, training and education grow residents' assets, promote economic opportunity for all segments of the population, and foster alignment between the workforce and the needs of industry. With the economy shifting toward the service sector, higher-paying jobs are requiring higher levels of education, training and skills. Workforce development is needed to assist lower-skill, lower-wage workers in moving up to higher-skill, higher-wage opportunities in their industries.

The SCDEW serves as the Workforce Investment Board (WIB) for the purposes of the federal Workforce Investment Act (1998). The Board works in partnership with business, labor, local workforce development offices and state operating agencies to create a comprehensive state workforce development system. Through local partnerships among education, economic development agencies, business, and labor, the SCDEW serves as a one-stop delivery system for the region.

Area workforce investment service delivery offices are an additional resource for education and career advancement. These offices include a full service One-Stop workforce system that is employer-led, demand-driven, customer-friendly, and continuously improving.

ReadySC Program

Formerly known as the South Carolina Special Schools Program and the Center for Accelerated Technology Training, the ReadySC Program is South Carolina's workforce training resource for companies locating or expanding in the state. The State Board for Technical and Comprehensive Education (TECH) operates the program and oversees the statewide Technical Education College System. The purpose of the ReadySC



program is to recruit, screen, and train individuals for specific assignments with new and expanding businesses and industries. With the exception of very specialized areas, the workforce training is provided at no cost to the company. The program is funded entirely with state money and imposes no target populations.

The ReadySC program is one of the oldest start-up workforce training programs in the United States and has been used as a model elsewhere. Since its inception in 1961, the program has trained nearly 267,000 workers for over 2,000 firms. Workforce training is usually short-term and is provided prior to opening day or expansion. This assures a trained workforce ready to go to work when the facility opens. The workforce training programs are usually located near the facility and often conducted at the facility itself, if feasible. Each program is customized to a company's unique specifications.

When an employer decides to locate or expand in the state, ReadySC works to make sure the company will have the trained workers needed when the facility starts operation. Some of the major steps involved in the ReadySC process include the following:

- ReadySC staff members meet with the company and analyze the jobs and skill levels needed.
- Representatives of ReadySC, in partnership with SCDEW, begin recruiting prospective workers. Advertisements are placed with various area media completely at the expense of the state.
- Training materials such as manuals, videotapes, slides, and charts are developed and tailored to the company's processes. ReadySC has a media support center capable of producing these types of instructional materials.
- Instructors—either TECH staff or the employers' staff—are chosen and trained in instructional techniques, if necessary.

- The instructors are paid by ReadySC.
- The training facility is prepared and equipment obtained. Classes are planned and a lead-time schedule is prepared. The schedule is designed to have workforce training completed approximately two weeks prior to hiring needs.
 - The workforce training courses are conducted to the standards and requirements of the company. During the workforce training, any trainees who do not meet the required standards are removed from the program.
 - Counseling and training in good work habits is provided.
 - If needed, the pre-employment training may be followed by a period of on-the-job training after the trainee has been hired.
 - When the company is ready to expand or add more employees, ReadySC is available to assist in the training of the new employees. There is no limit to the number of times ReadySC may be used.

Apprenticeship Carolina

Launched in 2007, Apprenticeship Carolina, works to ensure all employers in South Carolina have access to the information and technical assistance they need to create demand-driven registered apprenticeship programs. Since its launch, the number of registered apprenticeship programs in the state has grown by more than 300 percent to more than 300 programs. South Carolina's apprenticeship programs have become a national model for workforce development.

The number of apprentices at work in the state, meanwhile, has quadrupled to 3,163, a dramatic increase from 777 five years ago. According to Apprenticeship Carolina's director they are, by far, the fastest-growing apprenticeship system in the country.



That is important because as South Carolina has struggled with record-high unemployment in recent years, one of the complaints most often heard has been the mismatch between available work and inadequately trained workers. This program allows businesses to train a person to do work that is available.

The program works like this: A company working with the registered apprenticeship program either hires or identifies a full-time employee for train-

ing to fit a company need, then constructs a hands-on training and classroom experience for four years. The employee's wage can rise as training progresses in the program. At the end, the employee also has a federally recognized credential certifying a broad-based level of training, adequate for hiring anywhere in the country.

Many S.C. companies have established apprenticeships on more than one track, both electrical and mechanical, for example. The program approaches companies to tell them solutions that are available through it. Registering a company with the U.S. Department of Labor's apprenticeship program also brings a \$1,000-a-year state tax credit to the company, good for as many four-year apprenticeships as the company establishes.

Some of the Program's targeted industry clusters and current client companies include:

- Construction Technologies
- Energy (including agribusiness and biofuels)
- Health Care
- Information Technology
- Advanced Manufacturing and Technologies
- Transportation, Distribution and Logistics
- Tourism and Service Industries

FEDERAL GOVERNMENT

The Department of Housing and Urban Development provides access to community development block grants and economic development loan guarantees. The purpose of these programs is to help communities restore, renew, and create the economic base for future growth.

The Small Business Administration (SBA) provides long-term financial assistance, training services, and management counseling to small businesses and entrepreneurs. Small business incubators, technological transfer centers, and similar public-private partnerships use SBA resources to promote start-ups and nurture growth within the business community. SBA also provides an array of technical and business assistance through their Small Business Development Centers (SBDC).

The Department of Commerce administers the Economic Development Administration, which helps distressed communities create jobs and spur economic growth and development programs. The Minority Business Development Agency helps minority groups enter the private market place or expand their business, and the International Trade Administration helps United States exporters compete more effectively in the world market.

The Department of Agriculture is the primary rural and small town federal economic development agency. Through its Rural Development Program, the department offers business and industrial loan guarantees, community facility loans, and water and waste disposal grants and guarantees.

The Department of Labor administers the Workforce Investment Act of 1998, which works to consolidate, coordinate, and improve employment, training, literacy, and vocational rehabilitation programs in the United States.

Assessment

The region benefits from strong and substantial institutional capacity, with highly skilled and specialized economic development professionals. The primary organizations working to reinforce and strengthen study area economies (Development Authorities, Chamber of Commerce, downtown organizations) and their affiliates form a strategic alliance among themselves and state/federal agencies to advance economic development in the area.

The partnerships between these organizations and the CMCOG results in local and regional economic development services needed to implement economic development strategies. Without such partnerships and coordination, individual counties would be forced to provide these functions in-house, requiring higher levels of expenditures to pay and support staff.

The region aggressively promotes new development and improved public and private amenities for both existing and prospective businesses. They have invested in infrastructure, land acquisition, and have partnered with entrepreneurs, offering tax and other incentives to promote private investment.

The type of leadership required for the new services-based economy, partnering government, business and education, has been on-going during the last decade in the area. There are fairly strong linkages around economic development among public, private, education and nonprofit leaders and institutions. Such linkages will strengthen the regional economy.

Institutional strengths are also evident at the state level. South Carolina's Small Business Development Centers are considered to be among the best in the nation and viewed favorably by businesses. The state's ReadySC program resulted in South Carolina being ranked first in the nation for its workforce training programs by Expansion Management magazine in 2003. South Carolina's long track record of small business assistance and workforce development programs has provided the region with a strong competitive advantage.

The region’s jurisdictions generally have well established chambers of commerce and development authorities that provide necessary information for new businesses to make location decisions. The various downtown authorities/associations should include additional website content on available downtown properties and the types of industry they want to attract.

DEVELOPMENT TOOLS

There are a number of business incentive programs available to municipalities and counties in the region to attract and retain industries. Decisions on incentives are based on the availability of resources, and the cost-benefit of providing the incentives. Some incentives include:

- Tax increment financing (TIFs)
- Special assessment financing (Community Development Districts, , Municipal Improvement Districts, etc.)
- Industrial revenue bonds
- Fee In Lieu of Taxes (FILOT)
- Payment in Lieu of Taxes (PILOT)
- Multi-County Business or Industrial Parks
- Special Source Revenue Bonds (SSRBs)
- Infrastructure Credits

Figure 6.7 inventories local, state and federal development tools. Please note that incentives are based on individual prospects and may differ from jurisdiction to jurisdiction.

FIGURE 6.7: ECONOMIC DEVELOPMENT INCENTIVES

Incentive	Source	Purpose
Air Carrier Personal Property Exemption	State	Provides tax exemption for personal property of air carriers that operate an air carrier hub terminal facility in SC.
BCI Lending Services	State	Finance institution that provides financial products and capacity-building services to promote growth and competitiveness of new and existing small/medium businesses.
Biodiesel Production Credit	State	Income tax credits for the production of biodiesel. The amount of the credit is 20 cents per gallon of soy-based biodiesel produced and 30 cents per gallon of non-soy biodiesel produced. To receive the credit, a company must meet certain standards and minimum production requirements.

FIGURE 67: ECONOMIC DEVELOPMENT INCENTIVES (CONT.)

Incentive	Source	Purpose
Biodiesel Construction Credit	State	Income tax credits for constructing a facility in SC that produces and/or distributes renewable fuels. Renewable fuel means a liquid nonpetroleum based fuel that can be placed in motor vehicle fuel tanks and used as fuel in highway vehicles.
Biomass Resources Credit	State	Credit against corporate income taxes or corporate license fees or both, for 25% of the costs incurred for the purchase and installation of equipment used to create power, heat, steam, electricity, or another form of energy for commercial use from a fuel consisting of 90% or more biomass resource.
Business Development Corporation	State	Financial institution that provides term loans to new/expanding businesses unable to obtain financing through normal banking sources. Loans can be obtained for most business purposes except for investment, speculative and eleemosynary ventures.
Child Care Program Credit	State	Provides income tax credits to companies for capital and operating costs associated with establishing and operating a child care program.
Community Development Block Grant Entitlement Communities	Local	Locally managed revolving loan funds which can provide flexible financing. Can be for long-term, fixed rate financing, variable financing or working capital.
Corporate Headquarters Credit	State	Provides a tax credit against corporate income and license taxes for companies that establish or expand a headquarters facility. Must create at least 40 new full-time jobs.
Corporate Income Tax Moratorium	State	Eliminates corporate income taxes for companies that expand or locate in a “distressed” county.
Economic Development Set-Aside Fund	State	Provides grants to reimburse infrastructure and project costs.
Economic Impact Zone Credit	State	Provides tax credit for qualified manufacturing and productive equipment properties that are placed in service during the taxable year in an economic impact zone.

FIGURE 67: ECONOMIC DEVELOPMENT INCENTIVES (CONT.)

Incentive	Source	Purpose
Energy Conservation and Renewable Energy Credit	State	Provides tax credit equal to 25% of all expenditures incurred during the taxable year for the purchase and installation of certain energy conservation and renewable energy production measures.
Enhanced Corporate Headquarters Credit	State	Provides additional credit against 20% of the tangible personal property costs of establishing a corporate headquarters. Credit may be used to eliminate both a company's franchise tax and the corporate income tax.
Expedited Permitting/Permit Fees	Local	Provides discounted permit fees based on a company's investment and number of jobs.
Exporters' Income Deferral	State	Provides deferral on tax attributable to an increase in gross income from foreign trade when company intentionally ceases exporting property or after three years with no gross income from foreign trading receipts (whichever occurs first).
Fee-in-Lieu of Property Tax (FILOT)	Local	Reduces a property's millage (tax) rate and assessment ratio for up to 20 years. Must have minimum capital investment of \$2.5M.
Five Year County Property Tax Abatement	Local	Provides five-year exemptions from county property tax for businesses engaged in manufacturing, corporate headquarters, corporate office facility, distribution facility, or research and development.
Hiring Family Independence Recipient Credit	State	Provides a tax credit for employers who employ residents who have received family independence payments within SC for 3 months immediately prior to becoming employed. Must make health insurance available.
Industrial Revenue Bonds	Local	Provides tax-exempt financing for manufacturing facilities, port facilities, recycling facilities, and other purposes. Bonds can also be used to avoid personal guarantees and other collateral requirements of conventional lenders.

FIGURE 67: ECONOMIC DEVELOPMENT INCENTIVES (CONT.)

Incentive	Source	Purpose
Infrastructure Construction Credit	State	Provides credits to corporate income tax for corporate contributions to infrastructure construction or improvement of water lines, sewer lines, and road improvements that are eventually dedicated to public use or a qualifying private entity. Credit is given for 50% of the expense, not to exceed \$10,000 per project per year, with a 3 year carry-forward of unused credits up to \$30,000 for each project.
Investment Tax Credit	State	Allows companies locating in SC a credit against their income tax for its investment in new production equipment. To qualify, property must be used as an integral part of manufacturing, production, or providing transportation.
InvestSC, Inc.	State	Assists the Venture Capital Authority (VCA) of South Carolina in meeting their goals and objectives. The VCA has partnered with venture capital funds that are willing to invest in companies looking to locate or expand.
Job Development Credits	State	Provides a refund of the personal income tax withholdings remitted on behalf of its employment. Must be creating new jobs and significant capital investment.
Job Retraining Credit	State	Provides up to \$500 per production employee per year for the purpose of retraining if it is necessary for the business to remain competitive or to introduce new technologies.
Jobs Tax Credits	State	Provides a tax credit of up to \$8,000 per job for companies establishing or expanding manufacturing, distribution, processing, tourism, warehousing and R & D Facilities. Must create and maintain a certain number of new jobs per year.
Jobs-Economic Development Authority (JEDA)	State	Provides loans, investments, exportation and the promotion of services and capital revenue. Administers the New Market Tax Credit (NMTC) program - a federal tax incentive program to help spur the investment of capital into businesses located in low-income communities.

FIGURE 67: ECONOMIC DEVELOPMENT INCENTIVES (CONT.)

Incentive	Source	Purpose
Land Cost Write-Downs or Subsidies	Local	Provides local assistance to a company for the cost of land if company locates on county owned property.
License Tax Credit for Infrastructure	State	An eligible industry (transportation providers, utilities, electric coops, telephone companies), can claim a credit against its liability for amounts paid in cash to provide infrastructure for an eligible project.
Manufacturers of Renewable Energy Systems and Components Credit	State	Income tax credit equal to 10% of qualifying expenditures to qualifying companies in the renewable energy field who are expanding or locating in SC.
Minority Business Credit	State	Provides a tax credit to businesses that have contracts with the state and award subcontracts to a certified SC-based minority business.
Multi-County Parks	Local	Increases level of job credits a company can receive. Utilized in cases where a company or expansion entails substantial new employment create.
Personal Property in Transit	State	Provides exemption for personal property in transit with “no situs” status.
Pollution Control Property Tax Exemption	State	Provides property tax exemption for facilities or equipment designed for the elimination, mitigation, prevention, treatment, abatement or control of internal or external water, air or noise pollution.
Port Volume Increase Credit	State	Provides income tax credits to qualifying companies that use state port facilities and increase base port cargo volume by five percent over base-year totals.
Property Tax Exemption	Local	Eliminates property tax liability for Inventories and intangible property.
Qualified Recycling Facility Credit	State	Provides a 30% tax credit each year for businesses constructing or operating a qualified recycling facility.

FIGURE 67: ECONOMIC DEVELOPMENT INCENTIVES (CONT.)

Incentive	Source	Purpose
ReadySC Workforce Training	State	Provides employment training resources for companies locating or expanding in the state generally at no cost to the company.
Research & Development Tax Credit	State	Provides tax credits to companies that engage in research and development activities.
Retail Facilities Revitalization Credit	State	Tax credits for rehabilitating abandoned retail facility sites that encourage businesses to renovate, improve and redevelop those sites.
Rural Infrastructure Fund	State	Provides qualified counties in rural areas with financial assistance for infrastructure and other activities that enhance economic growth and development.
Sales Tax Exemptions	State	Provides a variety of sales tax exemptions for companies engaged in eligible activities including manufacturing, fuels, packaging, and long distance telecommunications.
SC Capital Access Program	State	The SC CAP reserve fund is used to offset losses on any loan in the participating financial institution's SC CAP portfolio. If a financial institution participates in SC CAP, a special reserve fund, which is owned by the state, but managed by Business Development Corporation of SC, is set up to cover future losses from a portfolio of loans that the institution makes under the program.
SC Job Training Incentives	State	Provides job training grants up to \$9,500 in value to companies that relocate or expand existing operations.
Solar Energy Credit	State	Credit against income taxes equal to 25% of the costs incurred in the purchase and installation of a solar energy system, including a small hydropower system, for heating water, space heating, air cooling, energy efficient daylighting, heat reclamation, energy-efficient demand response or the generation of electricity in or on a publicly-owned facility in SC.

FIGURE 67: ECONOMIC DEVELOPMENT INCENTIVES (CONT.)

Incentive	Source	Purpose
Special Source Revenue Bonds	Local	Provides funds for infrastructure for improved or unimproved real property used by manufacturing or commercial enterprises ("Special Source Improvements"). Funds originate from FILOT payments received by the county for projects located in multi-county parks.
Special Source Revenue Credit	Local	Provides local assistance to a company for specific project costs for a site, site preparation, and infrastructure.
State Tax Savings through Apportionment	State	Provides tax savings for manufacturers or distributors with sales in multiple states.
Tax Increment Financing (TIFs)	Local	Provides funds to finance the cost of capital improvements associated with residential, commercial, industrial, and mixed-use developments.
Textile Communities Revitalization Credit	State	Provides tax credits for rehabilitating abandoned textile mill sites that encourage businesses to renovate, improve, and redevelop those sites.
Tourism Infrastructure Development Grants	State	Provides grants to support new or expanding tourism or recreation facilities or designated development areas primarily through infrastructure assistance.
U.S. Department of Agriculture	Federal	Various programs addressing economic development efforts. See www.usda.gov
U.S. Department of Commerce	Federal	Various programs addressing economic development efforts. See www.commerce.gov
U.S. Department of Housing and Urban Development	Federal	Various programs addressing economic development efforts. See www.hud.gov
U.S. Small Business Administration	Federal	Various programs addressing economic development efforts. See www.sba.gov
Utility Rates	Local	Provides assistance in lowering utility costs.

Counties in the Central Midlands region have historically participated in a variety of state and federal programs and services designed to foster and promote economic growth. Community Development Block Grants (CDBG), the Economic Development Set-Aside Fund, Rural Infrastructure Fund and other related programs have all been used to support local economic development initiatives. The Economic Development Set-Aside Fund and the Rural Infrastructure Fund, administered by the Coordinating Council for Economic Development (CCED), are two key programs that provide grants to local governments for economic development efforts. Since 2005, Economic Development Set-Aside and Rural Infrastructure grants have been awarded to 14 projects in the region totaling \$6,491,000 for the purposes of creating a projected 2,727 jobs (Figure 6.8).

The CCED, established in 1986 by the South Carolina General Assembly, was formed in response to a general need for improved coordination of economic development efforts by those state agencies involved in the recruitment of new business and the expansion of current enterprises throughout the state. The Council consists of the heads or board chairs of 11 state agencies concerned with economic development: S.C. Department of Commerce, State Ports Authority, S.C. Department of Parks, Recreation

Figure 6.8 – Economic Development Set-Aside and Rural Infrastructure Grants 2005-2010

Recipient	Year	Amount	Projected Jobs	Projected Investment	Purpose of Grant
Fairfield County	2010	\$100,000	60	\$2,400,000	Building
	2009	\$1,000,000	Unvail.	Unavail.	New Park Dev.
	2007	\$230,000	90	\$8,000,000	Water/Sewer
	2007	\$150,000	Unavail.	Unavail.	Site Prep.
	2005	\$700,000	188	\$86,000,000	Rail
		\$2,180,000	338	\$96,400,000	
Lexington County	2010	\$2,500,000	1,249	\$90,000,000	Land Acquisition
	2009	\$50,000	5	\$6,000,000	Roads
	2008	\$400,000	300	\$27,500,000	Site, Infra.,Roads
	2008	\$150,000	105	\$9,250,989	Site Prep
	2007	\$135,000	78	\$12,000,000	Site Prep
	2006	\$136,000	50	\$5,500,000	Road,Water,Sewer
	2006	\$200,000	100	\$6,000,000	Roads
		\$3,571,000	1,887	\$156,250,989	
Newberry County	2010	\$700,000	502	\$15,007,000	Land Acquisition
		\$700,000	502	\$15,007,000	
Town of Winnsboro	2006	\$40,000	Unvail.	Unavail.	Master Plan
		\$40,000	Unvail.	Unavail.	

Source: SC Coordinating Council for Economic Development - Annual Reports of Fund Activity

& Tourism, S.C. Department of Agriculture, S.C. Technical College System, S.C. Research Authority, S.C. Department of Employment and Workforce, S.C. Department of Revenue, Jobs for Economic Development Authority, S.C. Department of Transportation and Santee Cooper. The Department of Commerce also maintains the SC Coordinating Council for Economic Development.

In 1987, the General Assembly passed a bill that provided for an additional 3 cents per gallon tax on the sale of gasoline in the State. The General Assembly charged the Coordinating Council for Economic Development with administering this new initiative known as the Economic Development Set-Aside Program. The Set-Aside Fund is dedicated to improving the economic well being of the State by providing funds to local government to develop the infrastructure necessary for new and expanding business. At inception, the fund was created from the first \$10 million received through State gas tax revenues. The annual \$10 million appropriation was later increased to \$18 million, and then in July 2006, to \$20 million. The funding source was also changed to be split between utility and gas tax revenues. By 2008, utility taxes were the sole funding source and Set-Aside revenue was capped at \$20 million.

The purpose of the Set-Aside Fund is to assist companies in locating or expanding in South Carolina. The program provides funding for competitive projects that, without Set-Aside participation, would not locate in South Carolina. Set-Aside grants are used primarily to fund road improvements, water and sewer infrastructure and site preparation costs related to business location and expansion.

The South Carolina Rural Development Act was enacted by the legislature in 1996 (SC Code § 12-10-80). This act established the Rural Infrastructure Fund (RIF) with the purpose of providing financial assistance to local governments, primarily in rural counties, for infrastructure and other economic development activities. The goal of the RIF program is to promote and encourage economic growth and prosperity in the State's rural areas.

Enabling legislation gave the CCED responsibility for funds generated by the provisions of the Rural Development Act, as well as for developing policies and procedures. Funding comes from companies participating in an Enterprise Zone Revitalization Agreement with the CCED, which permits companies to claim a refund for a portion of the employee state payroll tax withholding sent to the Department of Revenue each quarter. This refund is designated as a Job Development Credit (JDC) and may be used by the company to offset certain eligible company expenses, such as real property expenses, associated with its new or expanded operation.

Participating companies located in the least developed counties of the state are eligible to claim a refund of 100% of the JDCs to which they are entitled under their Revitalization Agreement. Participating companies in under developed counties may claim only 85% of the JDCs for which they are otherwise eligible; in moderately developed counties companies may claim only 70%; and in developed counties only 55%.

Assessment

The region's counties have significant track records in providing and coordinating incentives to support economic development projects. Because most economic development tools employ a combination of local, state and federal sources, it is difficult to compare local and state incentives to other communities.

Our counties use wide discretion in providing public funding to potential businesses. While the region is challenged in competing with very big metropolitan areas whose incentive packages can get much larger, it is not hampered by constitutional or other regulatory limits on development incentives found in some other localities and states.

BUSINESS CAPACITY

Business capacity is an important indicator of a community's ability to diversify its economic base. While government action can facilitate private investment, individual businesses ultimately make the decision to invest. Access to capital and support services is critical to business investment decisions.

ACCESS TO CAPITAL

Financial Capital

Financial capital refers to the availability and use of financial resources for new investment. Financial capital, including information and technical assistance, is particularly important to entrepreneurial development. Lack of access to capital can make it difficult or even impossible for investors to start their businesses and for existing businesses to expand and grow their enterprises. Conversely, regions with a full array of capital resources provide investors with the opportunity to start and grow their businesses in the same community.

There are dozens of financial institutions that support business growth in the region. These institutions range in size and scope from national banks such as Bank of America to regional banks such as BB & T, to locally controlled banks such as Arthur State Bank. These banks and institutions render an adequate supply of debt capital in the region. The structure of the banking industry in the region is supportive of capital availability. Typi-

cally, national and regional banks are more conservative lenders. The focus is on larger customers with less attention to the small business sector. In the Central Midlands region, however, there are a relatively high number of small businesses and all banks cater to this clientele.

Commercial and Professional Support Services

The commercial and professional support infrastructure includes a number of services that assist entrepreneurs and existing businesses in their activities. This category includes locally available legal, accounting, marketing and other business services, but not banking and financial services (which are included in the previous section on financial capital). Potential investors need easy access to these services, and a one-stop shop with information about availability of services and provider expertise.

The availability of legal and accounting services is a source of strength for the region. Both subsectors include a range of independent local firms. Many local accounting and law firms cooperate with partners from across the state, accessing expertise and resources that may not be available locally. Local providers are capable of assisting most types of businesses either using internal or external resources. The University of South Carolina Small Business Center also provides commercial and professional support services to entrepreneurs, assists with business plans, and provides entrepreneurs the opportunity to present their ideas to banking representatives. The mentoring and volunteer counseling program is a major asset.

Cooperation with local colleges and universities provides another resource for area businesses. For example, many of the programs at Midlands Technical College help place students in local businesses for internships. Both sides benefit from the program - students gain more hands-on experience, and entrepreneurs and small businesses receive needed assistance. In many cases, businesses later hire interns as regular employees.

Assessment

Overall, business capacity is fair in the region. The availability of financial capital can assist in establishing and expanding small and mid-size businesses that contribute to the area economies. Interest in SBA loan programs (both by banks and non-profit financial organizations) has increased the area's institutional capacity, thereby contributing to the region's competitive advantage. A significant entrepreneurial base has also been developed over time due to the availability of financial capital.

Business linkages are well developed among development agencies and the local and networked expertise to help entrepreneurs identify a provider that meets their needs. Consequently, entrepreneurs have to spend less time and energy finding business services with the appropriate expertise

and (with few exceptions) remain embedded within the local and regional provider network.

TAXES

State and local tax structures play an influential role in shaping the region's economic climate. Tax revenues fund the provision of key public infrastructure and services like transportation, education, public safety, and social services that are needed to support business activity and sustain overall quality of life. Yet if the tax burden placed on businesses is prohibitively high, especially for small businesses and start-ups, it can hinder productivity, cause companies to relocate, and diminish the region's ability to attract and retain high value industries. The challenge is to balance the tax burden in a way that is equitable, generating sufficient revenues to fund essential government services, while providing a competitive tax environment for the private sector.

CORPORATE TAXES

The following is a summary of South Carolina's basic business taxes as of April 2012 (Source: Area Development Online, April 2012) .

Corporate Income Tax:

Corporations are subject to a 5 percent corporate income tax on net taxable income derived from business activity conducted in the state. South Carolina offers a single-factor sales formula for apportioning income. For companies whose primary business in the state is manufacturing, distribution, or selling or dealing in tangible personal property, the company apportions its income by multiplying the net income remaining after allocation by a fraction consisting of the company's sales made in South Carolina divided by its total number of sales. This single factor sales formula eliminates property and payroll from the equation and is advantageous for a company with a majority of sales occurring outside of South Carolina. For multi-state companies whose primary business in this state is something other than manufacturing, distribution, or selling or dealing in tangible personal property (such as a service based industry), the company apportions its remaining federal taxable income based on a formula that consists of gross receipts.

Corporate License Tax:

Corporations must pay an annual corporate license tax of \$15 plus \$1 for each \$1,000 of capital stock and paid-in or capital surplus (earned surplus is not included). For multi-state corporations, the license tax is determined by apportionment in the same manner used in apportioning corporate income. The tax is not applicable to non-corporate entities.

SALES AND USE TAX

South Carolina's sales and use tax rate is 6 percent on gross receipts from retail sales or leases of tangible personal property. All four CMCOG counties assess an additional 1 percent local option sales tax. Proceeds of the local option sales tax go toward infrastructure improvements, to offset school millage, or to rollback property taxes. South Carolina offers a number of sales tax exemptions including: manufacturing production machinery and repair parts; manufacturing materials that become an integral part of the finished product; coal or other fuel for manufacturers, transportation companies, electric power companies, and processors; industrial electricity and other fuels used in manufacturing tangible personal property; R&D equipment; manufacturers' air, water, and noise pollution control equipment; material-handling equipment in manufacturing and distribution facilities investing at least \$35 million; packaging materials; long distance telecommunications services, including 800 services; and parts and supplies used to repair or condition aircraft owned or leased by the federal government or commercial air carriers. South Carolina also offers an exemption for construction materials used in manufacturing or distribution facilities investing at least \$100 million over 18 months. In addition to the sales tax exemptions, South Carolina further reduces the tax burden by providing a valuable sales tax cap of \$300 on the sale or lease of automobiles, trucks, boats, and aircraft to all companies and individuals.

PROPERTY TAX

In South Carolina, only local governments may levy property taxes. There is no statewide property tax, but the South Carolina Department of Revenue has the responsibility for assessment, appraisal, and equalization of taxable values of real and tangible personal property for manufacturing, corporate headquarters, corporate offices, and distribution facilities. Separate taxing provisions apply to mines, processors of primary forest products, public utilities, and airline companies. Real and tangible personal property are assessed at 10.5 percent for manufacturers; real property is assessed at 6 percent and tangible personal property at 10.5 percent for other businesses. Tangible personal property depreciates at a rate established by state law.

Property Tax Exemptions and Abatements

South Carolina exempts the following from property taxation: all inventories, intangible personal property, pollution control equipment and facilities, and personal property of air carriers that operate a hub terminal facility in South Carolina.

South Carolina also offers a five-year abatement from county operating taxes for new and expanding manufacturing and R&D facilities investing at least \$50,000 and for corporate headquarters and distribution facilities investing at least \$50,000 and creating at least 75 new full-time jobs. Gener-

ally, the county's operating portion makes up about 25–35 percent of the local millage rate. These partial exemptions do not apply to property under a Fee-in-Lieu agreement.

Fee-in-Lieu of Property Taxes

A Fee-in-Lieu of Property Taxes (FILOT) may be offered at the discretion of a county for companies with a total investment of \$2.5 million or greater on new buildings and equipment. Property that has previously been subject to South Carolina property taxes is not generally eligible for the fee unless a company is investing an additional \$45 million in the project beyond the price of the property. A negotiated FILOT could lower the assessment ratio from 10.5 percent to as low as 6 percent and either lock the current millage rate or adjust it every five years for up to 30 years. For certain large projects — such as \$400 million in investment or \$150 million in investment and 125 jobs — assessment ratios as low as 4 percent may be negotiated. Under the FILOT, personal property depreciates at a prescribed rate, while real property stays at cost for the life of the fee, except that with county consent, manufacturing real property in a FILOT may be taxed at fair market value as determined by a South Carolina Department of Revenue appraisal and may be re-appraised every five years. Additionally, property that is placed in service to replace existing fee property may be subject to the FILOT as well. As a general rule, property can be subject to a FILOT for up to 30 years.

Area Development Online, the leading magazine and information source for site and facility planning, conducts an annual survey of each state. The survey is distributed to a select group of location consultants who work with a nationwide client base. Based on the survey results, a list of the Top States for Doing Business is developed. Factors considered in the survey include the following:

- Overall cost of doing business
- Incentives programs
- Business friendliness
- Corporate tax environment
- Labor climate
- Labor availability
- Labor costs
- Work force development programs
- Infrastructure/global access
- Rail & highway accessibility
- Certified sites & shovel-ready programs
- Competitive utility rates
- Access to global markets
- Leading in the economic recovery

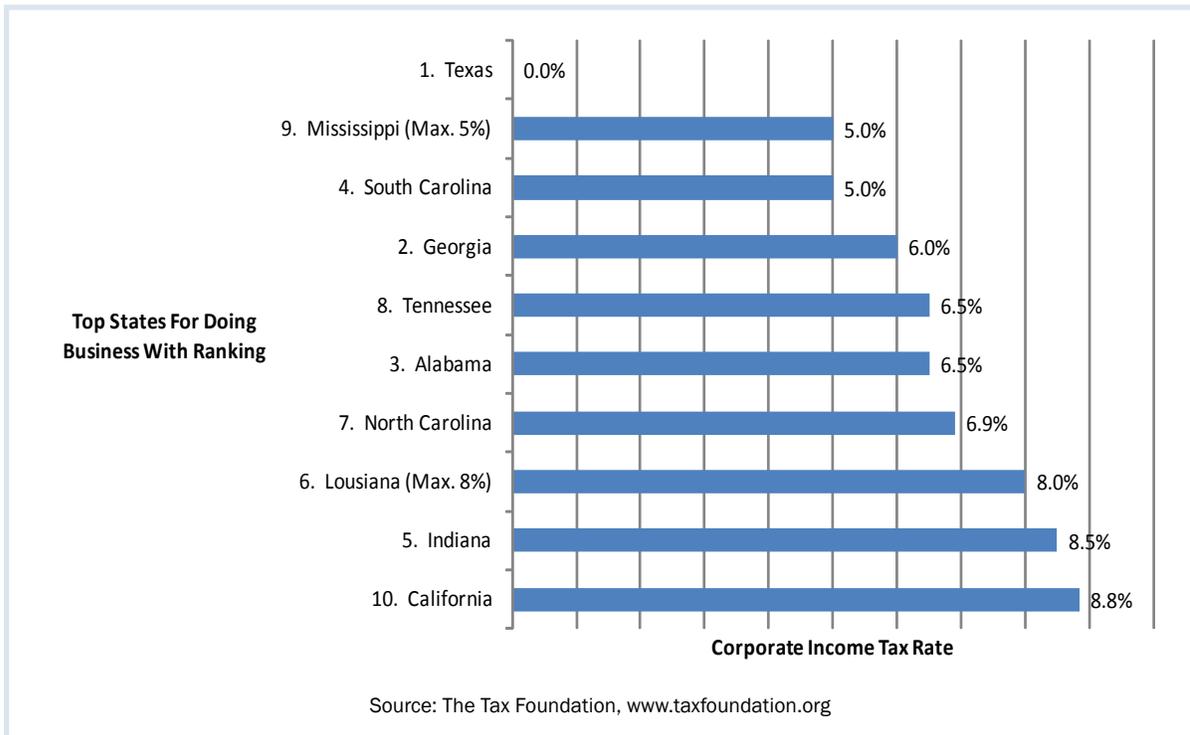
In Figure 6.9, the top 10 States are listed in order from lowest to highest corporate income tax rates.

One of the first items notable in this chart is the fact that the state's ranking among the best states for doing business does not always coincide with their corresponding corporate income tax rate. For example, while Mississippi and South Carolina both have the second lowest rate, in terms of overall top states for doing business they are ranked # 9 and # 4, respectively. This could be attributable to some of the other criteria used to rank the states such as utility rates or access to global markets. The chart also shows that South Carolina is near the top in terms of both low corporate tax rates and overall ranking of top states for business.

On April 16, 2012, the Small Business and Entrepreneurship Council (SBEC), a nonpartisan, nonprofit, small business advocacy and research organization dedicated to protecting small business and promoting entrepreneurship, released its 2012 annual publication of Best to Worst State Tax Systems for Entrepreneurship and Small Business.

The index ranks the 50 states and the District of Columbia according to the costs of their tax systems for entrepreneurship and small business. The report pulls together 18 different tax measures and combines those into one tax score that allows the 50 states and District of Columbia to be compared.

Figure 6.9:
Corporate Income
Tax Rates Among
Top States For
Doing Business
(2012)



The 18 measures are: 1) state’s top personal income tax rate, 2) state’s top individual capital gains tax rate, 3) state’s top corporate income tax rate, 4) state’s top corporate capital gains tax rate, 5) any added income tax on S-Corporations, 6) whether or not the state imposes an alternative minimum tax on individuals, 7) whether or not the state imposes an alternative minimum tax on corporations, 8) whether or not the state’s personal income tax brackets are indexed for inflation, 9) property taxes, 10) consumption-based taxes (i.e., sales, gross receipts and excise taxes), 11) whether or not the state imposes a death tax, 12) unemployment taxes, 13) whether or not the state has a tax limitation mechanism, 14) whether or not the state imposes an Internet access tax, 15) “Amazon” taxes, 16) gas tax, 17) diesel tax, and 18) wireless taxes.

According to the index, the 15 Best State Tax Systems are: 1) South Dakota, 2) Texas, 3) Nevada, 4) Wyoming, 5) Washington, 6) Florida, 7) Alaska, 8) Alabama, 9) Ohio, 10) Colorado, 11) Mississippi, 12) Michigan, 13) South Carolina, 14) Tennessee, and 15) Missouri. Notably, South Carolina was ranked ahead of several regional neighbors including North Carolina (#38), Georgia (#20), Virginia (#16), and Tennessee (#14).

Figure 6.10 shows South Carolina’s ranking among several of the tax measures included in the index:

Figure 6.10 – Business Tax Index 2012 – SC Rankings

Tax Measure	SC Rank (1 is best)
All Measures	13
Gas Taxes	4
Diesel Taxes	4
Corporate Income Tax Rate	9 (5%)
Corporate Capital Gains Tax	11 (5%)
State & Local Sales, Gross Receipts & Excise Taxes	12
Individual Capital Gains	14 (3.92%)
Wireless Taxes	26
Personal Income Tax	38 (7%)
Unemployment Taxes (Adjusted)	38

Source: Small Business and Entrepreneurship Council (2012); www.sbecouncil.org

Overall, business related tax structure advantages tend to be mirrored regionally as the southeast has among the lowest business tax rates in the nation. There are no constitutional restrictions that limit local governments in recruiting businesses through the use of financial and tax incentives in South Carolina.

Residential Taxes

For most local governments in South Carolina including those in the Central Midlands region, the largest portion of general fund revenues comes from property taxes. Revenue from residential property taxes is used to fund local schools, police, fire protection, libraries and other services. Residential property taxes in all four counties are significantly below the estimated national average (\$1,180).

South Carolina law provides for the following ratios to be applied to the market or use value of property to arrive at the assessed value:

- Legal residence: 4%
- Second home (or any residential property where you do not live): 6%
- Agricultural real property (privately owned): 4%
- Agricultural real property (corporate owned): 6%
- Commercial real property: 6%
- Manufacturing real and personal property: 10.5%
- Utility real and personal property: 10.5%
- Personal property: 10.5%
- Railroads, airlines, pipelines, real and personal property: 9.5%
- Vehicles (ratios reduce each year until 6%): 8.25%

The median property tax in Fairfield County is \$554 for a home worth the median value of \$91,600 (Source – www.tax-rates.org). The average yearly property tax paid by Fairfield County residents amounts to about 1.49% of their yearly income.

The median property tax in Lexington County is \$753 per year for a home worth the median value of \$133,200. The average yearly property tax paid by Lexington County residents amounts to about 1.23% of their yearly income.

The median property tax in Newberry County is \$756 per year for a home worth the median value of \$94,500. The average yearly property tax paid by Newberry County residents amounts to about 1.55% of their yearly income.

The median property tax in Richland County is \$1,059 per year for a home worth the median value of \$143,000. The average yearly property tax paid by Richland County residents amounts to about 1.63% of their yearly income.

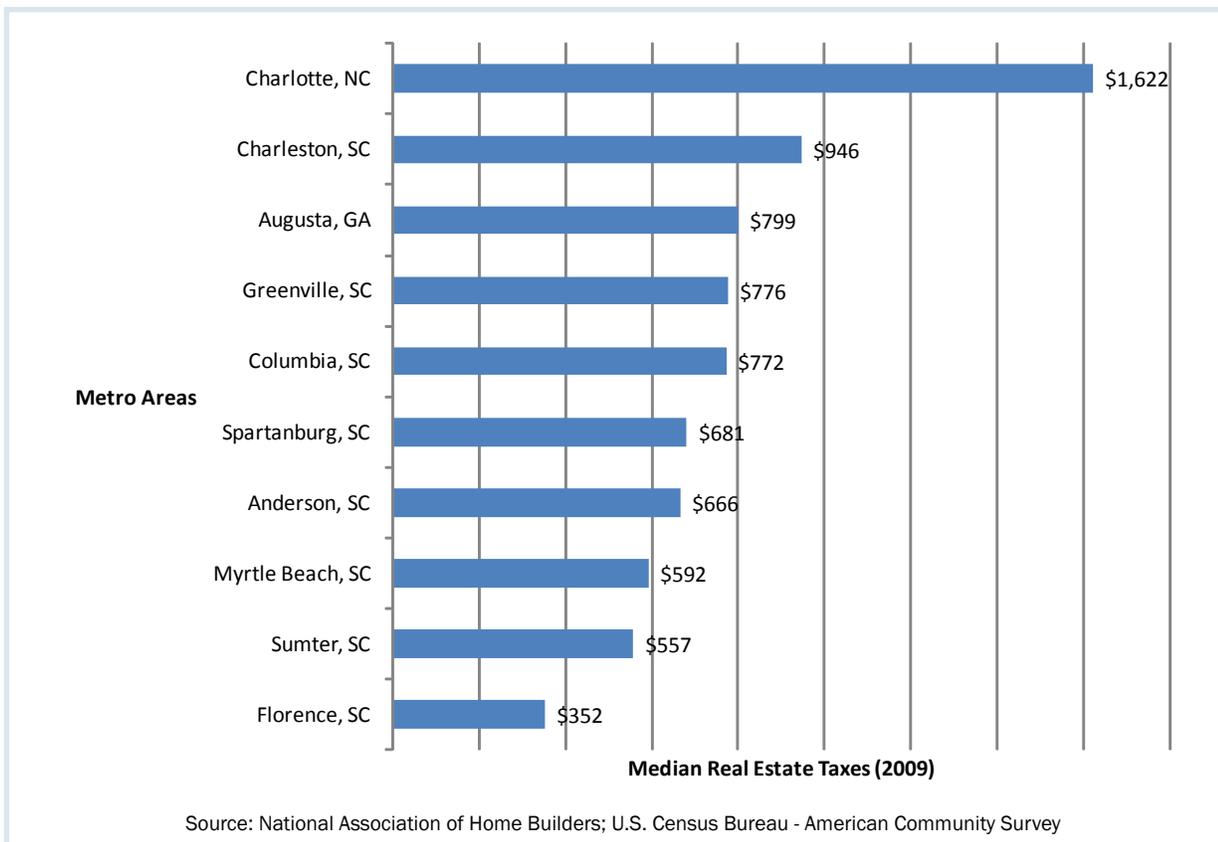
Residential taxes in adjacent metropolitan areas are important to note since many communities rely on a competitive economic environment in metropolitan areas to get new residents and the corresponding economic opportunities that come with them. Figure 70 identifies the real estate property taxes for the Columbia metro area and nine other nearby areas.

The chart shows that the Columbia area is competitive in its real estate property taxes compared to these areas, ranking 6th lowest among the ten. Interestingly, three metro areas smaller (though comparable) in population than the Columbia metro (Charleston, Augusta, and Greenville) have higher real estate taxes. All other metros with lower taxes are smaller than the Columbia metro area. Worthy of note also is the Charlotte, NC metro median tax that is more than twice that of the Columbia metro area.

Assessment

Taxation levels are difficult to evaluate because of the methods different localities and states use to calculate them. Based on the available data, the region’s taxation appears to be competitive relative to national averages and to other nearby areas. Lower levels of taxation have been credited with the boom in southeast economies.

Figure 6.11: Median Real Estate Taxes in Selected Metro Areas (2009)



LABOR FORCE

Labor is a critical factor in today's global markets. The labor force is defined as the pool of individuals who are 16 years of age and over, and are either employed or who are actively seeking employment. Enrolled students, retirees, stay-at-home parents and other persons not actively seeking employment are excluded from the labor force.

It is important to understand the difference between total jobs (identified in the economic trends section) and labor force participation rates. Total jobs are the total of all jobs available in a jurisdiction. The labor force participation rate is the total supply of workers within a jurisdiction (i.e. residents).

LABOR FORCE PARTICIPATION

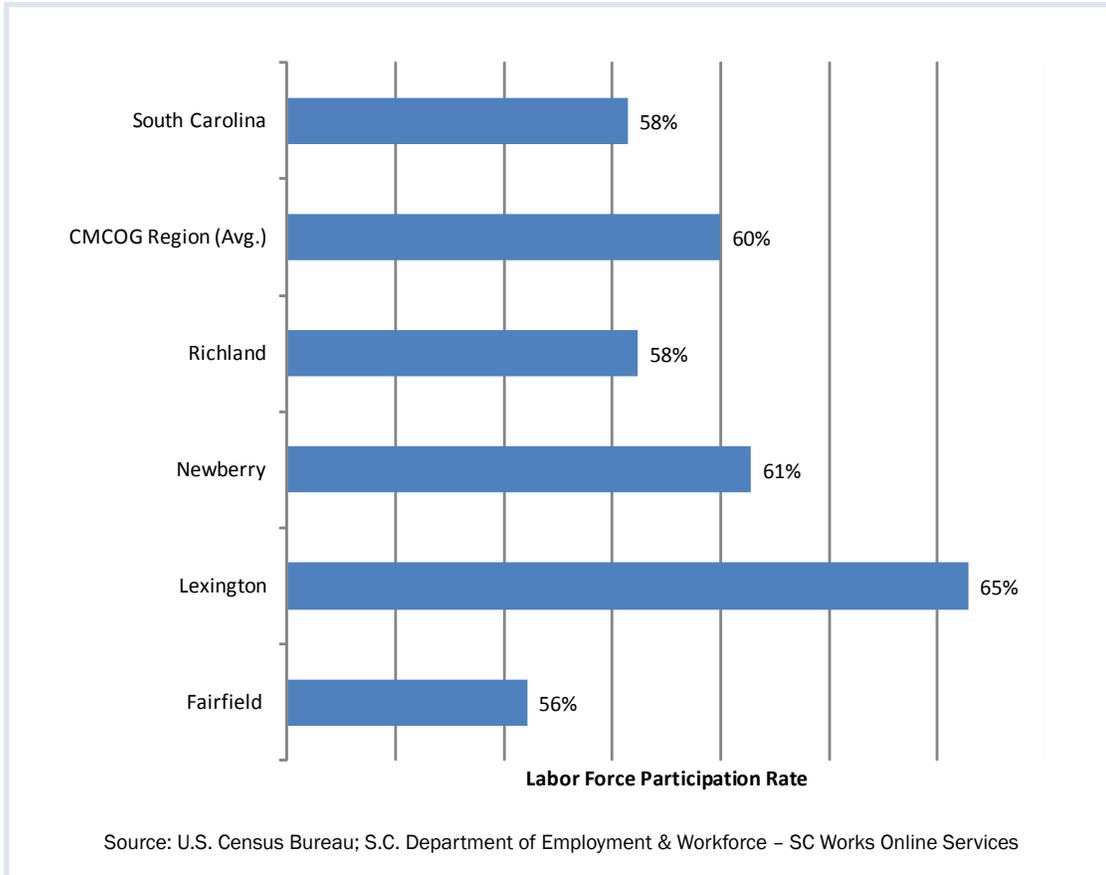
The labor force participation rate is the proportion of the total noninstitutionalized civilian population 16 years of age and over that is in the civilian labor force. The rate is essentially the ratio of the civilian labor force to the total noninstitutionalized civilian population 16 years of age and over. Labor force participation rates are commonly calculated using data derived from the Census of the Population. Due to unavailable noninstitutional population data at the county level, the civilian population 16 and over was used in determining participation rates in the region.

The labor force participation rate indicates the proportion of the available "working age" population that is willing and able to work and is either employed or actively seeking employment. It is found by dividing the labor force (total civilian labor force) by the population (total noninstitutionalized civilian population).

The national labor force participation rate has risen significantly since the 1960s. The current participation rate is approximately in the high-60 percent range. The primary reason for this rise is the increased participation of women in the labor force. The traditional husband-works-and-wife-stays-at-home stereotype has changed dramatically over the decades. While differences persist, the male participation rate is in the mid 70 percent range, but falling, and the female participation rate is about 60 percent, but rising. If these trends continue, participation rates for males and females are likely to be about the same in the future.

In the Central Midlands region, the average labor force participation rate (60%) is above the state (58%) rate (Figure 6.12). Within the region, there are significant differences between the counties with Lexington having the highest rate (65%) and Fairfield having the lowest (56%).

Figure 6.12:
Labor Force
Participation
Rates, 2011



UNEMPLOYMENT

Unemployment rates are another indicator of labor availability. Examining unemployment rates by county with recent U.S. Department of Labor data (December 2011), it becomes clear that the two rural counties (Fairfield and Newberry) are experiencing unemployment rates that exceed the national rate and, in Fairfield's case, also exceed the SC rate (Figure 6.13). Fairfield County historically has had high rates of unemployment probably due to fewer employment opportunities available in the County relative to the rest of the region.

EDUCATION ATTAINMENT OF THE WORKFORCE

Local workforce educational level is a major factor when companies examine potential locations for investment. Graduation rates and educational attainment are indicators of workforce quality. Of the 448,728 persons 25 years of age or older within the region, 38 percent have only a high school education or less (Figure 6.14). Conversely, 62% have at least some college.

Figure 6.15 shows educational attainment for each county in the region as well as S.C. and the U.S. Richland County has the highest rates of those holding at least a Bachelor's Degree. Lexington County has the highest rate of those with some college or an Associates Degree and Fairfield County

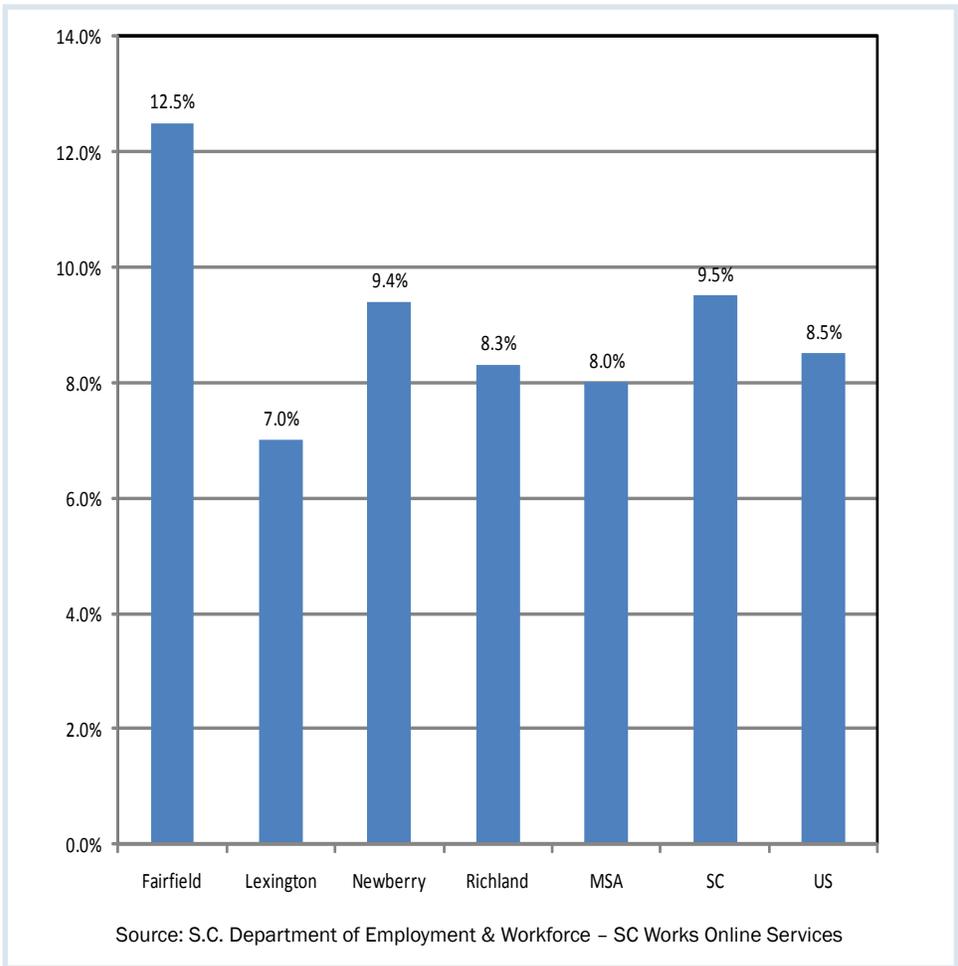


Figure 6.13 :
Unemployment
Rates CMOG
Region, MSA, SC,
USA Dec. 2011

has the highest rate of those with a high school diploma. Compared to the State of South Carolina as a whole (Figure 6.16), the region has a lower percentage of those who did not graduate high school (high school drop-outs), and higher percentages of those with some college or an associate degree, a bachelor’s degree or a graduate/professional degree.

The region’s educational attainment also surpasses the United States as a whole. Similar to the comparison with the State of South Carolina overall, the region has a lower percentage of those who did not graduate high school (high school drop-outs), and higher percentages of those with some college or an associate degree, a bachelor’s degree or a graduate/professional degree.

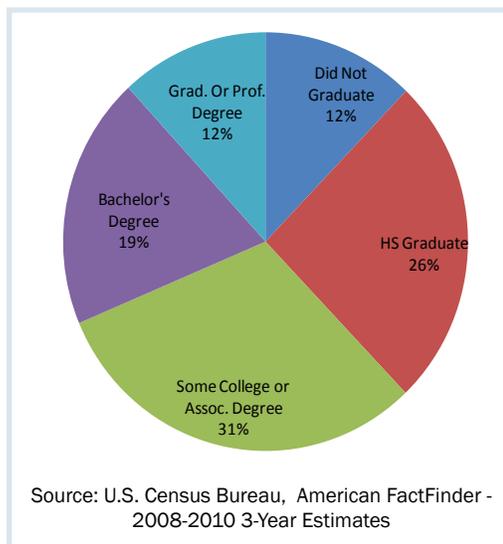


Figure 6.14:
Regional
Educational
Attainment

Figure 6.15: Educational Attainment by County

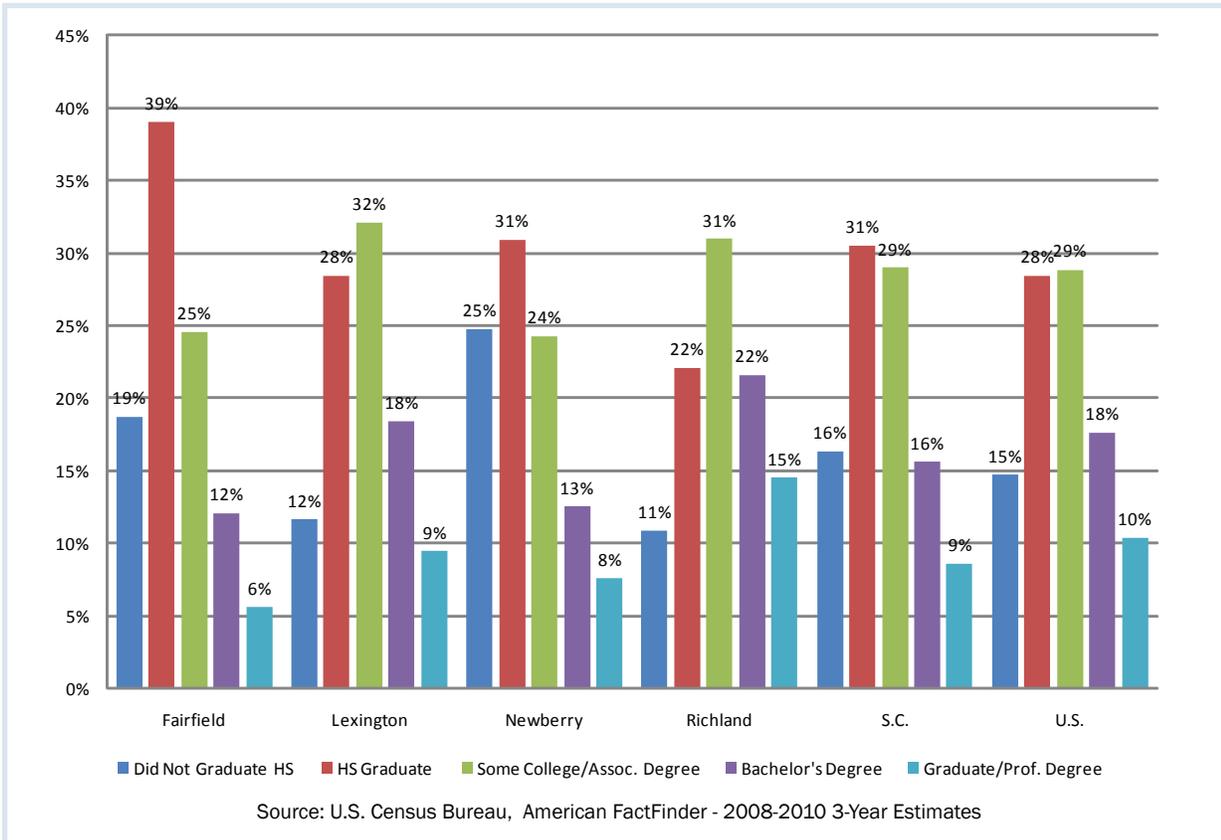


Figure 6.16: Educational Attainment Comparison

	Did Not Graduate HS	HS Graduate	Some Coll./Assoc. Degree	Bachelor's Degree	Grad. / Prof. Degree
CMCOG Region	12%	26%	31%	19%	12%
South Carolina	16%	31%	29%	16%	9%
United States	15%	28%	29%	18%	10%

Source: U.S. Census Bureau, American FactFinder - 2008-2010 3-Year Estimates

LABOR COSTS

For most industries, labor costs are the highest capital cost and regional differences in labor costs can result in winning or losing a business. Competitive labor costs in the southeast have resulted in new auto plants, distribution centers and other large-scale industrial operations where labor costs are a significant portion of expenditures.

Figure 6.17 presents average yearly wages by industry. Like the other income and wage indicators noted previously, the general trend is for wages to be significantly below the State and national averages. Some sectors like Transportation and Warehousing and Information have similar wages to the State average, in other categories the State average is significantly higher. Regional wages in areas where the most jobs are projected to increase such as Information, Finance and Insurance exceed (in Information) and lag behind (in Finance and Insurance) creating a mixed picture of the cost of labor in these sectors. Compared to the U.S., the region's wages are significantly lower in all sectors except Agriculture, Forestry, Fishing and Hunting.

Figure 6.17:
Average
Annual Wages
for Selected
Industries,
2010

	CMCOG Region	South Carolina		U.S.A.	
		Avg. Wages	Region Vs. State	Avg. Wages	Region Vs. USA
Agriculture, Forestry, Fishing & Hunting	\$31,776	\$28,725	+9.60%	\$26,636	+16.18%
Construction	\$38,720	\$41,030	-5.97%	\$49,597	-28.09%
Manufacturing	\$46,493	\$49,568	-6.61%	\$57,526	-23.73%
Wholesale Trade	\$46,875	\$54,485	-16.23%	\$63,629	-35.74%
Retail Trade	\$22,960	\$24,455	-6.51%	\$26,652	-16.08%
Transportation & Warehousing	\$39,544	\$37,715	4.63%	\$44,197	-11.77%
Information	\$55,267	\$50,670	8.32%	\$57,682	-4.37%
Finance & Insurance	\$42,016	\$52,714	-25.46%	\$84,518	-101.16%
Healthcare & Social Assistance	\$35,735	\$40,268	-12.69%	\$43,725	-22.36%
Accommodations & Food Services	\$12,422	\$15,043	-21.10%	\$17,177	-38.28%
Public Administration	\$37,241	\$44,143	-18.54%	\$57,643	-54.79%

Source: U.S. Bureau of Labor Statistics – Quarterly Census of Employment & Wages

Assessment

With the exception of Fairfield County, the region's labor force is competitive and performs well when compared to the State and national percentages. Above average labor force participation rates are an asset for economic development efforts. The more residents that can be attracted to the area and whom are able to participate in the economy, the higher the probability of attracting new businesses and retaining existing ones.

Educational attainment is above the State and national averages. The challenge is to continue to increase the percentage of residents holding bachelor, graduate and professional degrees. This challenge is especially important in attracting hi-tech and information technology jobs to the region. The challenge of balancing the needs of the region's employers, large and small, with the skills of the region's workforce will continue into the future. The region's low labor costs, as expressed in average annual wages, provide it with a competitive advantage over other parts of the state and the nation. The region's relatively low cost of living will continue to attract new residents and, by extension, increase the available labor supply available to existing and prospective businesses.

EDUCATION

Public School Systems

Public school systems are important for economic development in three ways. First, it is these schools that provide the education and skill foundation for future employees and business leaders in the region. Second, school districts are among the largest employers of area residents. Increases or decreases in the level of employment by schools will impact the community's economic activity. Third, the quality of public schools is a significant consideration to business leaders that are deciding where to locate their companies. Conversely, the quality of the public school system may be a key factor to skilled workers that are considering relocating to an area.

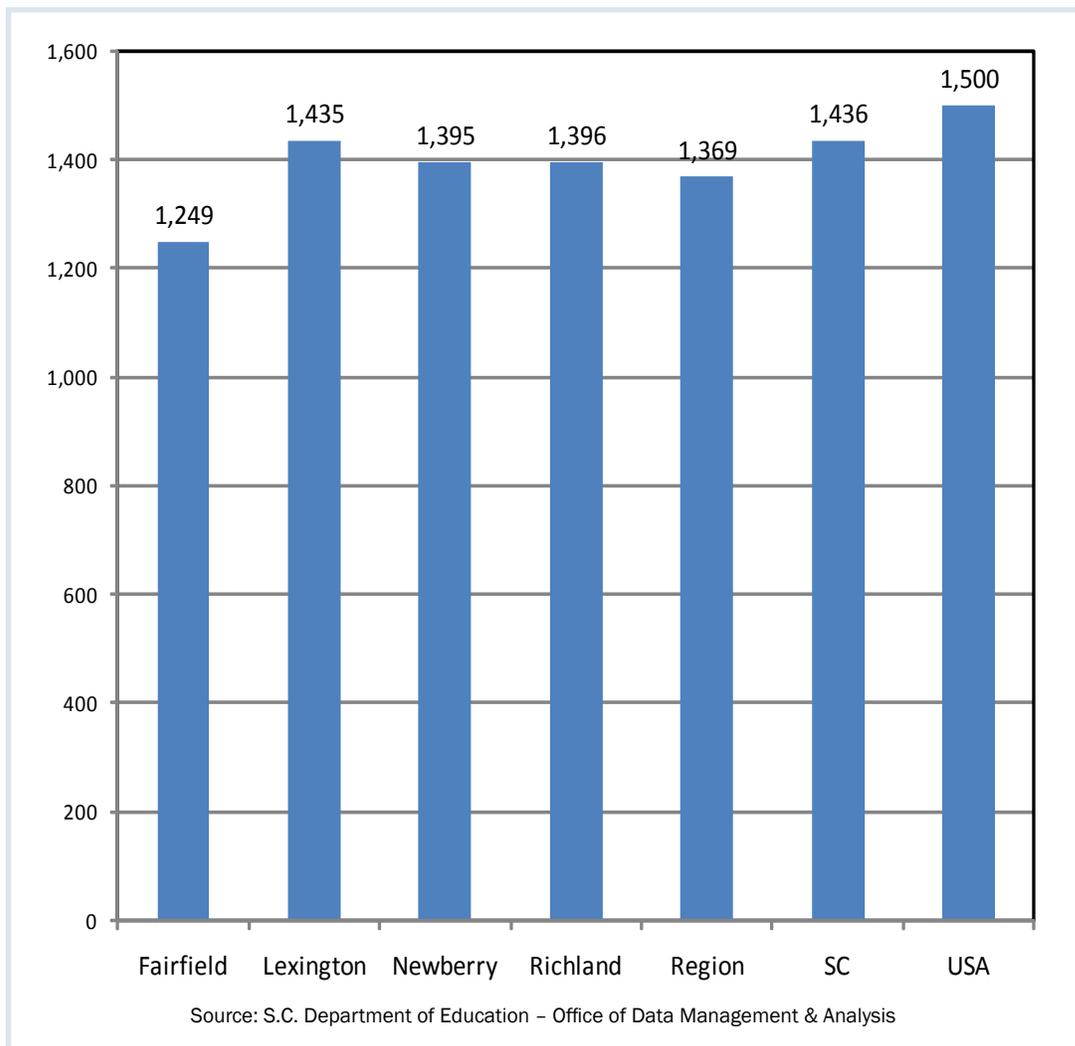
Any economy depends on an educated and healthy labor force. Labor is highly mobile, but the local systems and institutions that provide ways to support human resources are very important for community economic development. For example:

- Good schools attract families and are an important variable when firms decide where to locate.
- Availability of post-secondary training that can be tailored to a particular employer's or industry's needs is important for location decisions.

The region counts hundreds of elementary, middle and high schools, and enrolls tens of thousands of students. How these schools perform on state and national standardized tests will determine readiness for higher education and employment opportunities.

Average SAT Scores for each county, the region, South Carolina, and the U.S.A. are presented in Figure 6.17. At 1,369, SAT scores for the region are 4.6% below the state average and 8.7% below the national average (Maximum possible score is 2400). Every county in the region had an average SAT score below the state average. The highest scoring county, Lexington County, was within one point of the State average.

Figure 6.17 – Average SAT Scores, 2011



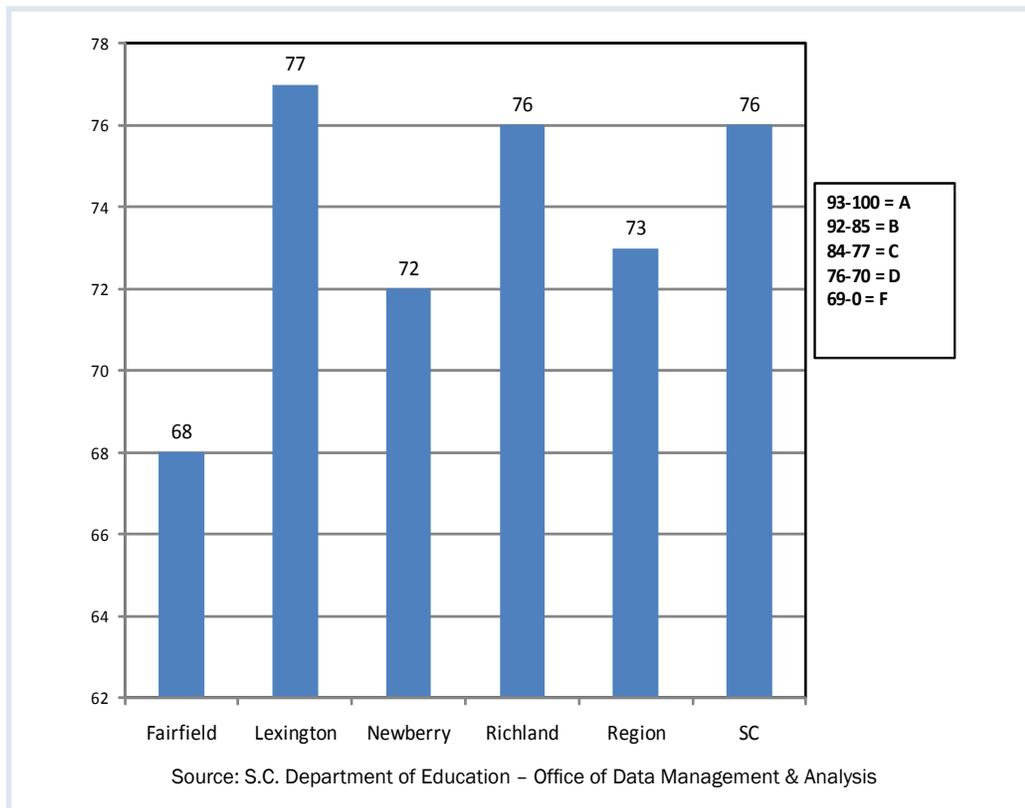
End-of-Course Examination Program (EOCEP)

With the passage of the South Carolina Education Accountability Act of 1998, South Carolina introduced the End-of-Course Examination Program (EOCEP). The EOCEP assessments promote instruction, encourage student achievement, document the level of mastery of curriculum standards and serve as indicators of program, school, and school-district effectiveness.

The EOCEP tests knowledge in high school core courses and for courses taken in middle school for high school credit. Students are tested in five subject areas: Algebra, English, US History, the Constitution, Physical Science and Biology. Test results in each of those areas count for 20 percent of each student’s final grade in these courses. All public middle school, high school, alternative school, virtual school, adult education, and home school students who are enrolled in courses in which the academic standards corresponding to the EOCEP tests are taught are required to take the appropriate tests.

Figure 6.18 presents the average overall 2011 EOCEP test scores for the Central Midlands counties (93-100=A, 85-92=B, 77-84=C, 70-76=D, 0-69=F). Based on this potential range of scores, the State average is a “D” at 76. The two urban counties (Lexington and Richland) are at or above the state average though Lexington scored a “C” and Richland a “D”. The two rural counties, Newberry and Fairfield, are below the State average with Newberry scoring a “D” and Fairfield an “F”. Overall, the region scored an average of 73, a “D”. These scores indicate that education at the middle and high school levels continues to be a challenge for the region (and statewide) though overall educational attainment of the adult population remains competitive.

Figure 6.18: Average End-of-Course Examination Program Scores, 2011

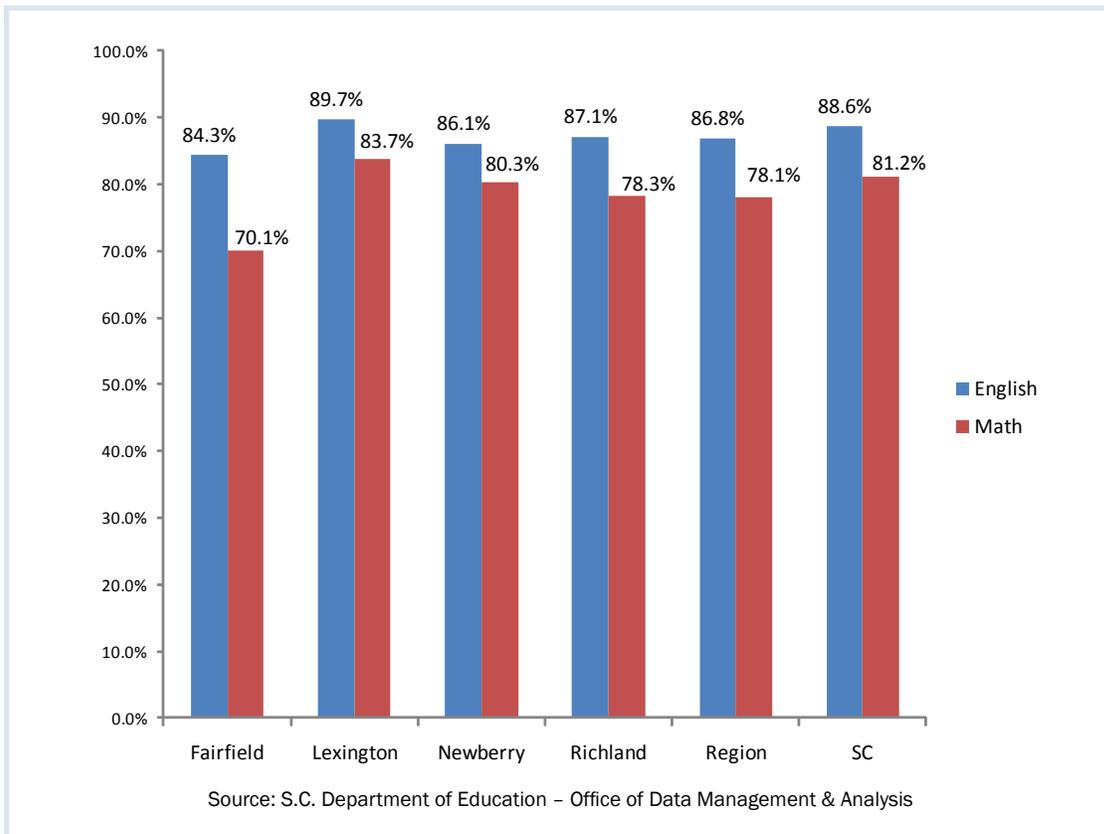


South Carolina High School Assessment Program (HSAP)

All students seeking a South Carolina high school diploma must pass the South Carolina High School Assessment Program (HSAP) test. The test evaluates knowledge in two areas – English language arts and mathematics.

A student must score at least a Level 2 on each test to meet the graduation requirement. Figure 6.19 shows passing rates for each county in the region as well as the region as a whole and a comparison with the State average. Though the region as a whole is below the State average in both English and Mathematics, the majority of the students in each county passed the test. Lexington County students achieved the highest passing rates for both English (89.7%) and Math (83.7%). Students in Fairfield County had the lowest passing rates in the region for both English (84.3%) and Math (70.1%).

Figure 6.19: % Passing High School Assessment Program, 2011



HIGHER EDUCATION

Institutions have broad missions that include meeting the needs of a wide range of individuals and employers, it is primarily the local and regional two- and four- year institutions that are best able to focus on and respond to local economies. Technical colleges in particular have done an excellent job of responding to the needs of small and mid-sized businesses, and have demonstrated they can successfully juggle a variety of missions.

Figure 6.18 presents an inventory of area technical and comprehensive four-year colleges. Technical colleges graduate thousands of area students annually in over 100 diploma and certificate programs that include a wide variety of technical skills.

Four-year colleges and universities are important for businesses needing highly-skilled workers as they provide advanced educational opportunities for the region’s residents. They also serve as major employers, generating significant economic impacts. There are two major colleges/universities in the region: University of South Carolina and Midlands Technical College. The region is also home to a number of smaller four-year colleges, including Benedict College, Columbia College and Newberry College.

Figure 6.18: Area Colleges and Universities

School	Enrollment	Degrees Offered
Allen University	848	Bachelor’s
Benedict College	3,137	Bachelor’s
Columbia College	1,121	Bachelor’s; Master’s
Columbia International University	563	Cert.; Bach.; Masters; Doctoral
Midlands Technical College	12,110	Cert.; Diploma; Associate’s
Newberry College	1,110	Bachelor’s
Remington College	Unavailable	Certificate; Associate’s
South University	1,173	Assoc.; Bach.; Master’s; Doctoral
University of Phoenix	805	Bachelor’s; Master’s
University of South Carolina	22,556	Assoc.; Bach.; Master’s; Doctoral
W.L. Bonner Bible College	61	Certificate; Bachelor’s

Source: The College Board (2012)

Assessment

The K–12 education system in the region is not as strong as it should be compared to elsewhere in the state. It may be an obstacle to the recruitment of new firms and residents. While SAT scores continued to climb in the past decade, performance on state achievement tests is still below the state average. Fortunately, the problem is recognized by leaders and strategies for improvement are frequently discussed. The success of any strategy will determine whether the region can turn this challenge into an asset in support of existing and prospective businesses.

Area higher education institutions – technical colleges, universities, and comprehensive colleges - are an asset to the region’s economic develop-

ment efforts. Midlands Technical College is credited with rapid response to industry changes and developing a technically sophisticated workforce that enhances employment opportunities for residents. The area’s four year colleges are supplying the region’s industries with highly-skilled technology and financial services sector workers that are crucial for the area economy. They are also an intricate component of institutional and business capacity.

HOUSING

The availability of affordable and adequate housing is critical for the growth of any area. The median cost of a house in the region is \$119,225, 11% below the state (\$134,100) and 37% below the \$188,400 national average (Figure 6.19). These values are somewhat skewed due to significantly lower cost housing in Fairfield and Newberry Counties compared to housing in Richland and Lexington Counties that are both above the state average.

The cost distribution of housing units demonstrates the variation between each county, the region, state and national averages. Approximately 56% of the region’s housing units are valued at \$150,000 or less, compared to 54% for the State and 40% of the nation’s housing supply (Figure 6.20). The affordable housing supply in the region (particularly in Fairfield and Newberry Counties) is a major benefit in economic development and growth initiatives.

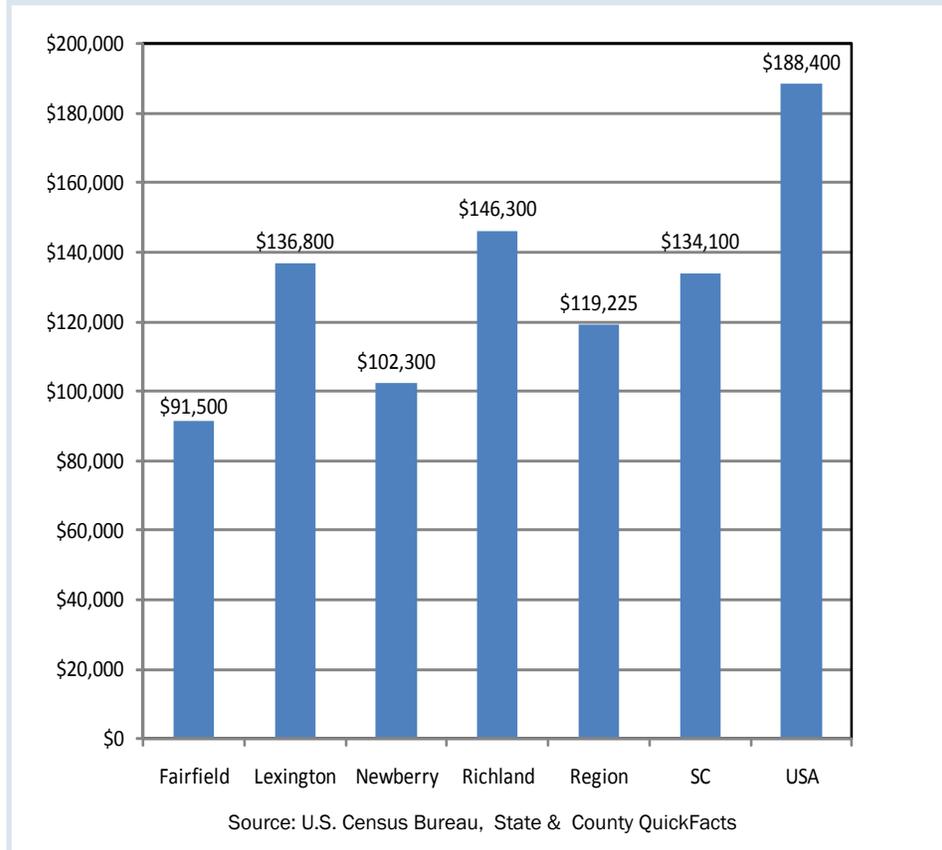


Figure 6.19: Median Home Values (2010)

The cost distribution of median monthly rents also points to a competitive advantage, particularly when compared to national averages. Approximately 45% of rents in the region are \$750 a month or less, compared to 38% for the nation (Figure 6.21). When compared to the State averages, the region is somewhat higher in average rents, primarily due to the urban, well developed areas of Richland and Lexington Counties.

The region's vacancy rates average approximately 11%, well below the State (17.4%) and national (12.7%) averages (Figure 6.22). The rates in Richland and Lexington Counties are significantly below the State average and are slightly less than the national average. This may indicate a need for a greater supply of rental units in these Counties as the vacancy rates in Fairfield and Newberry Counties are much closer to the State average.

Figure 6.20:
Range of
Housing
Values
(2010)

Range	Fairfield	Lexington	Newberry	Richland	Region	SC	USA
\$99,000 or less	56%	28%	49%	24%	29%	34%	24%
\$100,000 - \$149,999	15%	27%	18%	28%	27%	20%	16%
\$150,000 - \$199,000	6%	19%	14%	18%	17%	16%	15%
\$200,000 - \$299,999	8%	12%	9%	15%	13%	15%	19%
\$300,000 or more	15%	14%	10%	15%	14%	15%	26%

Source: U.S. Census Bureau, American FactFinder - 2008-2010 3-Year Estimates

Figure 6.21:
Gross Rent
Ranges
(2010)

Range	Fairfield	Lexington	Newberry	Richland	Region	SC	USA
\$499 or less	33%	12%	27%	12%	13%	19%	15%
\$500 - \$749	31%	34%	33%	31%	32%	32%	23%
\$750 - \$999	9%	28%	17%	30%	28%	23%	23%
\$1,000+	4%	17%	6%	21%	19%	15%	33%
No Cash Rent	23%	8%	17%	7%	8%	11%	6%

Source: U.S. Census Bureau, American FactFinder - 2006-2010 5-Year Estimates

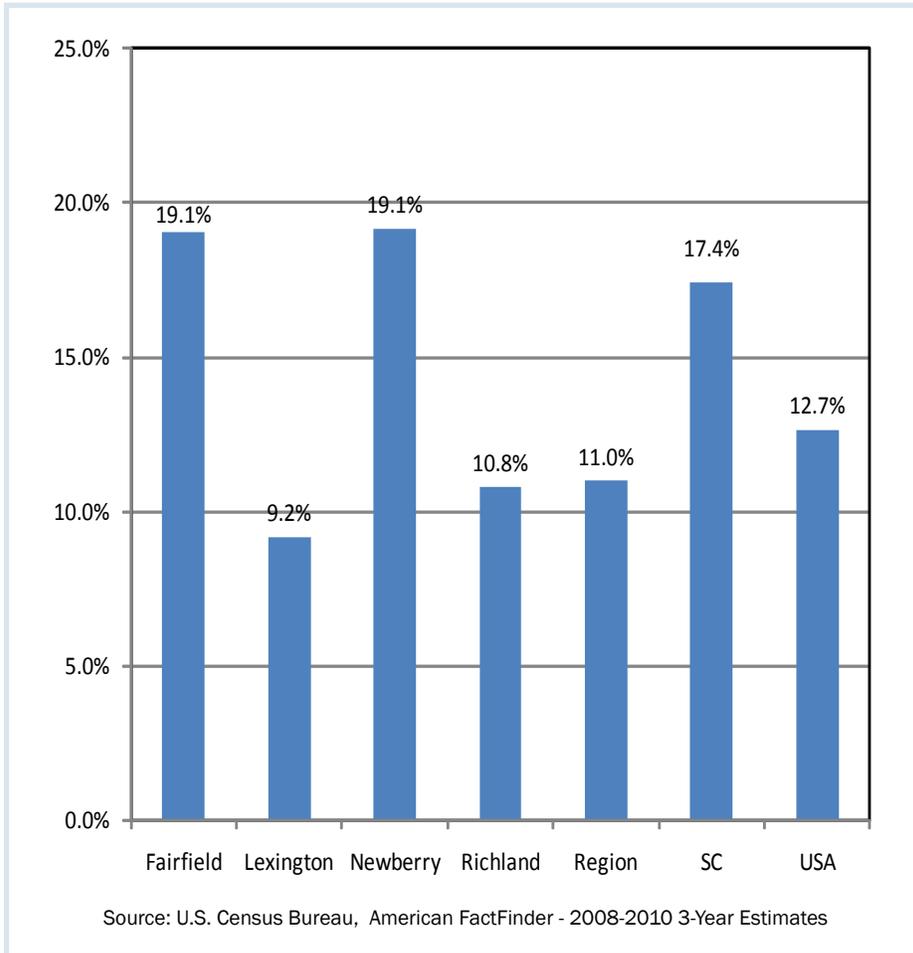


Figure 6.22:
Vacancy
Rates
(2010)

EXISTING PLANS

ECONOMIC DEVELOPMENT PLANS

Several economic development- related plans have been produced in the region in recent years. These plans were reviewed and considered when preparing the various elements of this CEDS. Consistency among these plans with this CEDS was an important element of the process. The plans reviewed during this process include the following:

- Richland County Economic Development Strategic Plan (2009)
- Fairfield County Economic Development Strategic Plan (2010)
- Midlands Workforce Development Board Strategic Plan (2009)
- Transitioning the Greater Columbia Economy into the Information Age (2003)

Local Comprehensive Plans

The comprehensive plan serves as a general policy guide for municipal officials and citizens to use in planning for future growth and development. The plan relates existing conditions to a corresponding list of short, medi-



**Historic
Downtown
Batesburg, Bates-
burg-Leesville,
Lexington County**

um, and long term goals that reflect how the jurisdiction plans to grow over the next ten to twenty years. The ultimate goal of the plan is to establish a set of guidelines and procedures that will serve as a tool for making informed decisions about land development, economic growth, infrastructure improvements, housing, transportation needs, and protecting natural and cultural resources.

A review of the region's comprehensive plans highlights the following economic development strategies:

- Infrastructure improvements are needed in order to help recruit new businesses.
- Build on major employers and recognize them as important stakeholders in the planning process.
- Focus on retaining and expanding existing firms and industries.
- Actively support the chambers of commerce and development authorities.
- Focus on downtown commercial and residential development.
- Upgrade and expand existing industrial parks and develop new ones.
- Recruit small businesses as aggressively as major ones.
- Diversify local economies.

CMCOG TRANSPORTATION PLANS

The CMCOG Transportation Planning Program supports the economic vitality of the region by promoting the safe and efficient movement of people and goods through the development of an accessible and well connected transportation system. The program works towards achieving this goal by developing and maintaining a number of regional transportation planning products:

- Urban and Rural Long Range Transportation Plans
- Motor Freight Plan
- Congestion Mitigation Plan
- Bike and Pedestrian Pathways Plan
- Human Service Coordination Plan

The Urban and Rural Long Range Transportation plans assess short and long term transportation needs and recommend a prioritized list of improvement projects such as road widening, intersection improvements, and transit enhancements. The highest priority projects identified in these plans are then moved into the Transportation Improvement Program (TIP) at which point funding can be allocated for their implementation.

The Motor Freight and Congestion Mitigation plans assess needs and recommend Transportation System Management (TSM) strategies that specifically relate to improving freight mobility and alleviating roadway congestion.

The Bike and Pedestrian Pathways Plan and Human Service Coordination Plan work towards improving the quality of life for residents by increasing transportation choices and ensuring accessibility to all users regardless of age and income.

CMCOG ENVIRONMENTAL PLANS

The CMCOG Environmental Planning Program examines regional environmental issues that are important to economic vitality:





- Air and Water Quality
- Open Space Preservation
- Sustainable Energy
- Natural Hazard Mitigation

The 208 Regional Water Quality Management Plan ensures the timely and orderly development of wastewater infrastructure by both public and private service providers which is instrumental in coordinating economic development projects.

The Regional Green Infrastructure Plan examines opportunities for preserving open space and improving water quality through the widespread adoption of Low Impact Development (LID) and smart growth principles. These opportunities are important for improving quality of life for area residents and providing job opportunities in the emerging green economy.

The Midlands Air Quality Forum was established by the CMCOG to serve as a collaborative effort to reduce ground-level ozone and other forms of air pollution across the Central Midlands Region. This effort is intended to prevent the region from being in “non-attainment” status with Federal regulations which could hurt existing businesses, limit the potential for recruiting new industries, and decrease the quality of life.

The Central Midlands Sustainable Energy Plan and Hazard Mitigation Plan relate to economic development by promoting regional energy independence and decreasing the vulnerability to potentially destructive natural hazard events such as tornadoes, floods, and hurricanes.

MILITARY RELATED PLANS

Local governments and private sector stakeholders in the Central Midlands region understand the economic importance of the areas military installations. Estimates show that approximately one in every three dollars spent in the midlands are related to Fort Jackson, McEntire Joint Air National Guard Base and the McCrady National Guard Training Center. In order to preserve these economic generators, CMCOG in partnership with Richland County, the City of Columbia and the Greater Columbia Chamber of Commerce have been working on a variety of projects and programs related to the Base Realignment and Closing (BRAC) process.

The most recent endeavor by CMCOG was the completion of the Fort Jackson/McEntire Joint Land Use Study (JLUS) which provided the local governments and military bases with a tool box of strategies for mitigating encroachment and compatibility issues around the bases. CMCOG is currently working on implementing some of the recommended action strategies. The Greater Columbia Chamber of Commerce also hosts a Military Affairs Committee which works to promote, enhance and strengthen the relationships between our community and the military.

MIDLANDS WORKFORCE DEVELOPMENT BOARD PLANS

The Midlands Workforce Development Board (MWDB), a division of CMCOG, is required to produce an annual local area workforce plan. The goals of this plan are to inform the interested public and system stakeholders of labor market conditions in Fairfield, Lexington and Richland counties (the MWDB service area), to provide a common language for discussing the local labor market between Midlands' education and workforce partners and to serve as a baseline for the allocation of program resources.

Local workforce goals identified in the 2011-2012 plan for 2013 include:

- Assess all Adult and Dislocated Workers who enroll in any WIA program for the Core 3 assessments of Reading for Information, Applied Mathematics and Locating Information.
- MWDB will work with all service providers and partners to be able have 2,000 individuals achieve a Career Readiness Certificate (CRC) before July 1, 2013.
- Because WorkKeys can only be effective if employers who require certain skills can be matched to potential employees with those skills, the MWDB commits to completing at least 12 new job profiles of employers by May 1, 2013.
- Seek to register spouses and eligible children of all Dislocated Workers who are enrolled in WIA.
- Address labor market challenges in vital sectors of the local economy

- by implementation of a priority training strategy.
- Aid the long-term unemployed in re-entering the workforce by developing workshops that address their specific needs.
- Increase services available for returning post 9/11 veterans by forming new partnerships with service providers.

SOUTH CAROLINA ECONOMIC DEVELOPMENT PRIORITIES

SC COMPETITIVE INITIATIVE

In 2005, Professor Michael E. Porter of Harvard University and the Monitor Company Group developed a study titled *South Carolina Competitiveness Initiative: A Strategic Plan for South Carolina*. The Study evaluated South Carolina's competitiveness for business, identified industrial clusters based on South Carolina's strengths (See earlier discussion on Business Clusters), and made several recommendations. The results of this study, all of which are consistent the contents of this CEDS, represent the present day economic development strategy and priorities of the State of South Carolina.

The Initiative was born out of increasing recognition and comprehension as regards South Carolina's economic makeup, status and performance. More exactly, it resulted principally out of the understanding of several business and government leaders in South Carolina that its traditional economic structures and processes were not keeping pace with the times. These traditional stratagems and practices were fundamentally ones characterized as those placing particular emphasis on a plentiful and flexible workforce, a superior physical infrastructure, and a responsive and pro-business government.

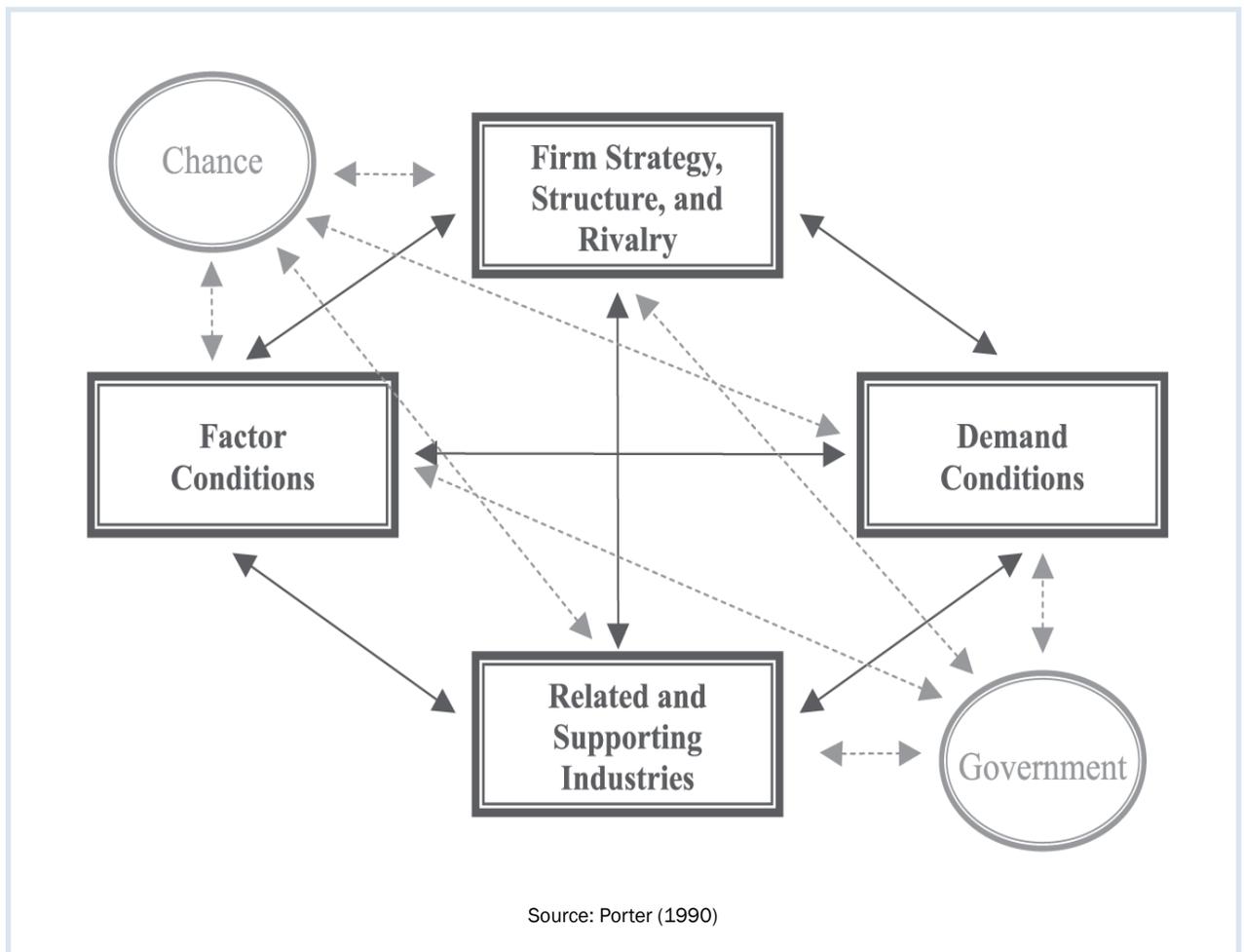
While these traditional schemes were core strategies with proven records of success and reflected prosperity heretofore, a general consensus among the Initiative members was that other long-term and progressive approaches were called for with the emergence of the 21st century and the resulting circumstances of growing global competitiveness and innovation. More particularly, South Carolina's business and political leadership recognized an unprecedented rapid transformation of the national and international economies. In the literature this transformation was frequently termed "the emerging new economy," and is defined by globalization with an ever-increasing reliance on knowledge-based technologies, and highlighted by intense competition, creativity and inventiveness.

The Initiative's Council clearly acknowledged and accepted this economic phenomenon, and through cooperation and mutual interest, reflection, study and planning, believed firmly that the traditional approaches were

out of synch, to some extent, with the new economy and that a new modern and comprehensive strategy was called for to stabilize and energize South Carolina's economic "engine." As such, the main Initiative participants set out five key objectives to be accomplished:

1. Bring together the relevant stakeholders—industry, academia, and government—to collaborate in developing a shared economic strategy for South Carolina;
2. Assess the competitive position of South Carolina and of the selected industry clusters in the state (i.e., automotive, chemical products, textiles, and tourism and hospitality);
3. Identify key challenges, opportunities, and new strategic directions for South Carolina overall, as well as for the selected clusters;
4. Promote consensus on an economic strategy and action

Porters Diamond Model



- agenda for South Carolina; and,
5. Act on the findings from the analysis, and measure progress.

The Initiative sets out in its report a multi-prong strategy to address problematic areas statewide and among four business clusters studied. This comprehensive strategy aims to achieve maximum economic performance and sustainability—in short—a competitive edge in the global marketplace. The strategic plan includes several vital components:

- Activate and upgrade clusters. Upgrade existing clusters by building critical mass and fostering linkages, and broaden cluster portfolio by seeding new clusters;
- Continue to enhance education and workforce training. Raise SAT scores and graduation rates to reach middle quintile of the United States by 2015, and leverage technical colleges to provide the workers needed for advanced processing;
- Invest in research and the university system. Increase investments in focused research areas aligned with the needs of industry, and ensure graduate level research and training capabilities commensurate with the needs of regional business and industry clusters;
- Launch internal and external marketing campaigns. Create a can-do mentality in South Carolina and position the state as a location ripe with opportunities for leading companies and talented people;
- Create an explicit economic development program for distressed and disadvantaged areas. Increase prosperity for all citizens of South Carolina;
- Increase support for start-ups and local firms. Create a supportive environment for start-ups and streamline regulations and policies to encourage expansions and upgrades;
- Create new institutions to support economic development. Collaborate and support existing institutions for collaboration focused on upgrading the local business environment, and create new ones as needed; and,
- Measure progress in raising prosperity. Define and track a set of metrics that measure progress towards prosperity, and provide direction for the above campaigns.

In response to the study, the state established a Council on Competitiveness which later became known as New Carolina. Their mission is:

“The Council seeks to develop and drive South Carolina’s long-term economic strategy by working with companies, government,

universities, economic development organizations, and other groups to identify and implement actions and policies that are aligned with the long-term strategy, and that will boost the competitiveness of South Carolina firms.”

This CEDS was coordinated with the leadership of New Carolina and determined to be consistent with their goals and objectives. CMCOG continues to work closely with New Carolina and participates in their ongoing efforts and activities including the September 22, 2011 celebration of seven years of the competitiveness initiative in South Carolina. At this event Michael Porter gave the keynote address, applauding South Carolina’s progress toward strengthening its knowledge economy. CMCOG also discussed the CEDS with area leaders and officials at this event further gathering input into the CEDS process.





7

ACTION PLAN

INTRODUCTION

In recent years, the region's economy underwent economic changes similar to other regions of the nation. For the urbanized area, this included the rapid rise of high technology jobs and the support services that sustain this industry. For rural areas, the changes resulted in declining manufacturing activity and the growth of the services sector. Industry growth is key in maintaining the area's economic vitality and competitiveness over time. The loss of manufacturing jobs has hurt the region. These jobs require specific skill sets and are among better paying employment opportunities. In addition, the loss of manufacturing jobs creates negative ripple effects in related sectors.

As the region's economic base shifted, the nature of the businesses also changed. The backbone of area economies has long been the presence of a number of very large employers – both in the productions and service sectors. However, in the last 15 years, the number of large employers has diminished and the importance of small businesses has grown.

In today's economy, economic development – particularly diversification – is a necessary and critical undertaking. A healthy and relative independence of sectors can ensure that a downturn in any area does not necessarily mean a downturn in the whole economy. Entering new markets and sectors is crucial for future growth and survival of any locality. The challenge of economic development is to distinguish between issues that can be improved and changed and issues which are outside the capability of local areas. Resources can then be focused on those areas within local capabilities and capacities. Therefore, the success of any long-term strategy is dependent on:

- Understanding the risks, capabilities and opportunities involved in a particular economic development strategy.
- Being able to promote and build on the strengths.
- Knowing when to overcome a weakness and when to live with it.
- Recognizing opportunities and embracing them.

ISSUES IN ECONOMIC DEVELOPMENT

NATIONAL AND GLOBAL INTEGRATION

Several ongoing trends have resulted in changes to the way economies function, both nationally and internationally. These include:

- *Increasingly Global Markets:* The world economy is becoming more integrated and the region has become less immune from national and global economic events. Economic development policy must therefore consider national and international economic factors for many of the region's key employers.
- *Rapidly Advancing Technological Innovation:* Technological innovation is enhancing productivity and changing the way goods and services are produced. Encouraging continued growth in productivity (including new investment and a focus on work force preparedness) is vital to evaluating area economies ability to compete.

Combined, these trends, often referred to GCT (globalization, convergence and technology), are fundamentally reshaping the nature of local and regional economies. Relationships between businesses are changing – customers are now able to search worldwide for specialized products or services. Convergence is dissolving the boundaries that traditionally kept industries apart, and is redefining many industries and markets. Knowledge and expertise are now as important as business, capital and plant assets.

REGIONAL ECONOMIC CHALLENGES

The region faces several economic development challenges in the coming decades, including infrastructure needs, declining municipal revenues and needed downtown revitalization. Cities and counties throughout the region have experienced a decline in revenues due to changes in federal and state revenue distribution policies. Furthermore, more and more federal and state mandates are either under-funded or not funded at all, thereby increasing local government financial burdens. At the same time, residential development has consumed large amounts of municipal services and tax funds, much more than it contributed to the revenue stream. Commercial and industrial users, on the other hand, have paid more in taxes than they have consumed in county services.

Evolving federal economic development policy is also changing. Since the 1970s, the federal government has withdrawn much of its state and local funding for local economic development initiatives. Local governments are on their own to a much greater extent than they have been in the past and are forced to take active roles in sustaining and stimulating job creation in a complex and interdependent global economy. CMCOG jurisdictions have tasked their respective economic development departments, regional economic development authorities and chambers of commerce with this workload. These agencies have strived to support and retain the economic base that they have and broaden economic activities to reduce the vulnerabilities to global influences that can occur in any one of their primary economic activities.

Compounding these regional issues is that metropolitan areas such as Columbia support localities far beyond the metropolitan areas. There are 4 counties (2 of them rural) in the CMCOG region that all depend on the well being of the Columbia economy. Historically, the rural localities pursued an undifferentiated, low-cost, commodity producing strategy instead of a value-added niche strategy. The rural counties are now faced with fierce global competition forcing companies to cut costs by substituting capital for labor to generate productivity improvements. Unskilled and semi-skilled labor has been hit hard by competition from low wage jurisdictions.

Rural communities have responded with their own industrial attraction programs but it is unclear whether the strategy will be successful. Industrial attraction efforts have been stymied by the downturn in the national economy, the increasing relocation of manufacturing overseas, and a decline in relocation activity among prospective firms. Companies that have relocated to the Columbia area are lured by the facilities and incentives available, which are typically beyond the means of rural communities. CMCOG communities are not alone in this situation, as numerous localities with newly constructed industrial parks have been unable to attract tenants.

VISION AND GOALS

VISION

The CMCOG region will be a diverse, vibrant and creative region supported by a sustainable and inclusive environment for workforce and economic development that enables the growth of businesses large and small, fosters secure, attractive residential and commercial neighborhoods and enhances the overall quality of life.

GOALS

Goal 1: Sustainable Economy

The CMCOG region will employ sustainable economic development practices that contribute meaningfully to a fiscally sound region by growing the commercial tax base and ensuring an equitable balance of the assessed commercial and residential property values.

Objectives:

- Partner with Area Economic Development Allies
- Support and Build Partnerships that Enhance Public-Private Collaboration
- Enhance Small Business Support
- Increase Tourism and Visitor Spending
- Support Tourism Assets Including the State Farmer's Market
- Maintain Strong Fiscal Health
- Facilitate the Growth of the Region's Green Economy

Goal 2: Skilled Workforce

The CMCOG region will foster an innovative and skilled workforce through collaboration between employers, educators and one-stop career centers.

Objectives:

- Encourage educators to focus on STEM (science, technology, engineering, math) disciplines to prepare students for technical job opportunities
- Communicate career pathways based on current and future employer demand
- Develop integrated workforce strategies to support employers' efforts in filling vacancies

Goal 3: High Quality of Life for Businesses and Residents

The CMCOG region will cultivate secure high quality commercial and residential districts and corridors that provide exceptional amenities that allow all businesses and residents to prosper.

Objectives:

- Encourage Distinctive and Secure Neighborhoods
- Foster a Retail Mix that Creates a Vibrant Place
- Adopt Policies that are Environmentally and People Friendly
- Recognize Cultural Assets and Opportunities
- Conduct Business and Resident Research
- Encourage Affordable, Efficient and Clean Transportation
- Support and Enhance Public School Quality

Goal 4: Superior Business Environment

The CMCOG region will be a superior business-friendly environment, which includes innovative and modern facilities, infrastructure and systems.

Objectives:

- Provide Resources and Support to the Existing Business Community
- Encourage Low-Cost and Renewable Energy Development Including Solar, Hydrogen, Biomass, and Wind
- Attract new Commercial Investments and new Business Locations, with a focus on those in Targeted Industry Clusters
- Maintain and Improve Important Business Infrastructure
- Provide Secure Business Infrastructure
- Provide Win-Win Incentives
- Encourage Desirable Real Estate Development
- Continue Efforts to Achieve Streamlined and Efficient Governance
- Encourage Discussion on Improving Service and Options at Columbia Metropolitan Airport

PERFORMANCE MEASURES

Performance measures are indicators that describe how well a program is achieving its objectives. Whereas a results statement identifies what we hope to accomplish, indicators tell us specifically what to measure to determine whether the objective has been achieved. Indicators are usually quantitative measures but may also be qualitative observations. They define how performance will be measured along a scale or dimension, without specifying a particular level of achievement. Progress through the CEDS period can be measured through utilization of a variety of the following statistical and other indicators for the region.

NUMBER OF JOBS CREATED/RETAINED

Given the recent recessionary period, the highest emphasis is placed on job creation and retention. Focusing on job creation and retention is an important tool for measuring the ultimate success or failure of any economic development plan. Job creation and retention can be measured through a variety of data sources, including the South Carolina Department of Employment and Workforce, U.S. Bureau of Labor Statistics, Central SC Alliance, SC Department of Commerce and others.

NUMBER AND TYPES OF INVESTMENT

This metric will be one of the more difficult to accurately track over time as investment types and the amount of information available for each will vary dramatically. CMCOG will attempt to track this information through available data throughout the CEDS period.

AMOUNT OF PRIVATE SECTOR INVESTMENT

New private sector investment is essential to grow the region's economy and sustain employment growth. While new private sector investment data is not necessarily publicly available or conveniently grouped for analysis, new investment is often reflected in job creation numbers. However, there is a benefit to tracking the amount and type of investments made by the private sector in the area. To that end, CMCOG will attempt to track this information for new and existing industry through available data throughout the CEDS period.

CHANGES IN REGIONAL ECONOMIC ENVIRONMENT

A variety of economic indicators will provide information on the economic environment of the region and CMCOG will track this information through available data throughout the CEDS period. Economic indicators to be tracked include the following:

- Employment
- Unemployment
- Home Sales
- Residential Building Permits
- Non-Residential Building Permits
- Gross Retail Sales
- Consumer Price Index
- ACCRA Cost of Living Index
- Gross Domestic Product
- Consumer Confidence Index
- Distressed Communities Data





8

STRATEGIC PROJECTS

The CEDS process is primarily undertaken to develop and qualify for the Economic Development Administration's grant programs. The process is also an opportunity to develop a comprehensive list of economic development and related projects the CMCOG region has identified as possibly implementing should job creation become a component of the project and if funds became available through EDA or other sources.

The region would like to pursue the following projects utilizing funding opportunities in addition to EDA to bring the greatest amount of economic development funding to the area. Though specific funding sources for each project have yet to be identified it is anticipated that local, state, regional and national foundations and grant programs will be explored as potential sources of funding.

As with funding sources, potential job creation for specific projects has yet to be determined. The region is aware that job creation is a fundamental requirement for EDA funding.

Projects in each county are listed in no particular order as all are considered “vital projects” by the individual local government that recommended their inclusion in this list.

At any time a project may become ready for consideration of a grant application as economic development clients commit to site development or an economic development workforce training or planning program becomes ready for funding.

The local governments in the CMCOG region guide the annual updates to this list and it is expected that they would be the lead organization responsible for execution of projects should they be implemented.

FAIRFIELD COUNTY ACTION STRATEGIES

Location	Project	Description	Estimated Cost
Cook Road / Peach Road	Infrastructure Improvements	Wastewater treatment facilities, water lines and gas lines to serve proposed industrial development	\$5M
Cook Road / Peach Road	Industrial Park	Development of a 600 acre Industrial Park at the corner of Cook and Peach Roads	\$2.5M
Jenkinsville	Jenkinsville Wastewater	500,000 gallon per day wastewater treatment plant	\$4M
Mitford	Mitford Sewer	Extension of public sewer service	\$5M
Mitford Area	Installation of Water Lines	Water line installation along Camp Welfare Road to the White Oak exit at I-77.	\$3M
Peach Road	Peach Rd. Widening/Upgrade	Widening and upgrading of Peach Road from Ridgeway to I-77.	\$3M
Ridgeway	Wastewater Plant Expansion	Expansion of treatment capacity	\$3M
Ridgeway	SC 34 Fire Hydrants	Installation of fire hydrants along SC 34 from the Town to Ridgeway Mining	\$500,000
Ridgeway	Smallwood Road Water Improvements	Extension of 8 & 10-inch water line from SC Highway 34, along Smallwood Road to US Highway 21.	\$380,270
US 321	Rail Spur to Industrial Park	Construct a rail spur to a proposed industrial park in the US 321 area.	\$10M
Western Fairfield County	Western Fairfield Co. Healthcare Facility	Construction of a primary healthcare facility	\$2.5M
Winnsboro	Water Improvements	Installation of a 16" raw water transmission line from the Winnsboro reservoir to parallel an existing 16" raw water transmission line to the water filtration plant in Winnsboro.	\$12M
Winnsboro	SC 200/I-77 Industrial Park	Industrial site development near the SC 200/I-77 interchange	\$7M
Winnsboro	Airport Hangar/Runway Extension	Additional hangar and extension of runway at the Winnsboro Airport.	\$5M
Winnsboro	Broadband Infrastructure	Expand broadband infrastructure throughout the Town of Winnsboro and surrounding communities	\$2.5M+
Winnsboro	Wastewater Treatment Plant	Upgrade and expansion of wastewater treatment capacity at the Town's existing wastewater treatment	\$4M
I-77 Corridor	Wastewater Plant Construction	Construction of Wastewater Plant for the Fairfield Industrial Corridor	\$35M
Throughout	Economic Development Plan	Economic Development Plan to assist with Workforce expansion, attaining more small businesses, commercial development. Offer Gap Financing and revolving loans.	\$1.5M
	Gap Financing		
	Revolving Loan Fund		
To Be Determined	Communications Center	Build Communications Center in order to house all County assistance offices in one place	\$3M

LEXINGTON COUNTY ACTION STRATEGIES

Location	Project	Description	Estimated Cost
Batesburg-Leesville	Industrial Park Infrastructure	Construct various infrastructure improvements to the B-L Industrial Park.	\$5M
Batesburg-Leesville	US 1 to Lewie Road Water Extension	Linking Batesburg-Leesville water system to Gilbert-Summit Water District via a 12" main extending east along US 1 to Lewie Road	\$1.3M
Calks Ferry Rd	Water Improvements	50,000+ LF of water main extension, a booster pump station and storage tank to the intersection of Calks Ferry Road and Highway 1	\$6.3M
Chapin	Business / Technology Park	Development of a business/technology park near Chapin with access near the SC 48 / I-26 interchange	\$3M
Chapin	Columbia Avenue Route 48 Widening	Construct road widening of Columbia Avenue Route 48 in Chapin.	\$5M
Chapin	Water and Sewer Improvements	Expansion of sewer treatment plant and new booster pumps for water system.	\$1.5M
Columbia Metro. Airport	John Hardee Expressway Phase II	Construct 2 miles of road to connect I-26 to SC 302.	\$90M
I-20 Corridor	Industrial Park	Planning and development of a new industrial park	\$13M
I-26 Corridor	Industrial Park	Planning and development of a new industrial park	\$6M
Pelion Airport	Runway and Sewer Improvements	Construct runway improvements and extend sewer service to the Airport.	\$3.4M
South Congaree / Pine Ridge	Water and Sewer Improvements	Extension of water and sewer via 12" mains from US 321 west along Pine Ridge Drive.	\$9.3M
US 321 Corridor	Industrial Park	Planning and development of a new industrial park	\$3M

RICHLAND COUNTY ACTION STRATEGIES

Location	Project	Description	Estimated Cost
Columbia	Alternative Fuel / Hydrogen Cell Technology Promotion	Promote development of alternative fuel/hydrogen cell technology through partnerships with local government, the University of South Carolina and other appropriate entities.	\$5M
Columbia	Assembly Street Railroad Bridge	Construct a railroad bridge on Assembly Street to improve traffic conditions.	Undetermined
Columbia	Bull Street Redevelopment (former SCDMH property)	Redevelop former SCDMH property into various housing and commercial sites.	Undetermined
Columbia	Business Revitalization	Commercial business revitalization efforts including public works and business lending. Apply for grants and other funding to implement a number of neighborhood plans.	\$1M
Columbia	Commercial and Residential Redevelopment	Implementation of 2004 adopted plan for commercial and residential redevelopment of 5 primary areas including Waverly & Rosewood.	\$100M+
Columbia	Commercial and Residential Redevelopment	Implementation of 2006 adopted plan for commercial and residential redevelopment of North Columbia. Over 20 Catalyst sites planned.	\$100M+
Columbia	Infrastructure Improvements	Infrastructure improvements on commercial corridors in Columbia to enhance appearance, attract and retain viable businesses, and strengthen adjacent residential areas	\$64M
Columbia	Infrastructure Improvements	Implement infrastructure improvements identified in City's Comprehensive and/or the Sumter-Columbia Empowerment Zone (SCEZ) Plans for commercial/industrial development projects	\$25M
Columbia	Midlands Collaborative Broadband Infrastructure	Expand broadband infrastructure throughout the City of Columbia and surrounding communities.	\$15M
Columbia	North Main St. Reconstruction	The North Main Street Improvements Corridor extends from Elmwood Avenue to Fairfield Road. The project has been divided into six phases and construction is progressing as funds are obligated to each phase.	\$41.1M
Columbia	Overall Road Improvements	Region-wide resurfacing / road rebuild efforts	\$15M
Columbia	Sidewalk Improvements	Region-wide sidewalk infrastructure	\$15M
Columbia	Three Rivers Greenway	Install infrastructure and floodway improvements in the Columbia/Vista/Innovista areas along the Congaree River.	\$60M
Columbia	Owens Airport Runway Improvements	Extension of Taxiway 'A'. FAA high priority safety enhancement project to improve pilot visual capability on the ground and remove the need for "back taxiing" on the runway.	\$4M
Columbia	Owens Airport Hangar Improvements	Restoration and redevelopment of the Curtiss-Wright Hangar. Possible uses include an aerospace and aviation education center, events venue and restaurant, or aviation small business incubator.	\$4M
Decker Blvd. / Ridgewood	Business Revitalization	Various activities to retain viable businesses and strengthen the adjacent residential area including physical improvements and major marketing efforts	\$5M

RICHLAND COUNTY ACTION STRATEGIES

Location	Project	Description	Estimated Cost
Lower Richland	Leesburg Road Widening	Preliminary engineering, right-of-way acquisition, and construction for widening Leesburg Road from Fairmont Road to Lower Richland Blvd (3.72 miles). Will relieve congestion by increasing capacity, improve safety for motorists and other roadway users by providing safer dedicated facilities, and help improve air quality by reducing idle times for motor vehicles.	\$27.4M
Lower Richland / Hopkins	Sewer Improvements	Construction of a wastewater treatment plant to provide wastewater treatment and sewer lines to the Hopkins area	\$14M
Lower Richland / Hopkins	Sewer Improvements	Construct Phase I of a sewer system expansion from the Town of Eastover to the Hopkins Community.	\$15.3M
Lower Richland / Hopkins	Sewer Improvements	Construct Phase II of the Hopkins sewer improvements to include service expansion in Hopkins and long Lower Richland Boulevard.	\$3.8M
Lower Richland / Hopkins	Sewer Improvements	Construct Phase III of the Hopkins sewer system to include the wastewater treatment plant upgrade to 2 mgd.	\$3.4M
Northeast Columbia	Hardscrabble Road Widening Project	Project activities include conducting preliminary engineering, right-of-way Acquisition and construction to improve and widen Hardscrabble Road in northeast Columbia from Farrow Road (SC 555) to Kelly Mill Road. Result would benefit residents and businesses in this highly congested area.	\$79.2M
Throughout	Storm Drainage Improvements	Storm drainage improvements in accordance with regional storm drainage plans	\$15M
To Be Determined	Technology / Industrial Park	Infrastructure to attract technology related companies including water, sewer, storm drainage, streets and utility support infrastructure and high-speed data transmitting capability	\$10M
Unserviced Areas	Water / Sewer Improvements	Extension of water and sewer service to unserved areas of Richland County	\$5M
Various	Master Land Plans	Plans with specific recommendations for use and development of land in areas including Piney Grove/St. Andrews, Dutch Square/Lower Broad River, Spring Hill, Olympia and Hopkins	\$650,000
Various	Sidewalk Improvements	Sidewalk improvements and infrastructure in unincorporated Richland County.	\$10M
Various	Road Improvements	Roadway improvements in unincorporated Richland County.	\$30M

NEWBERRY COUNTY ACTION STRATEGIES

Location	Project	Description	Estimated Cost
"A" Flood Zones	Storm Drainage Plan and Improvements	Develop and implement a plan to address major storm drainage problems located within the "A" flood zones as identified on the Flood Insurance Rate Maps	\$3M
Newberry	Small Business Incubator	Construct Class A office space to house a small business incubator in the City of Newberry.	\$5M

NEWBERRY COUNTY ACTION STRATEGIES

Location	Project	Description	Estimated Cost
Newberry	Industrial Park	Develop industrial park to include water, sewer, storm drainage, streets and utility support infrastructure including high-speed data transmitting ability	\$2M
I-26 corridor	Industrial Sites	Plan and develop two or more large acreage industrial sites.	\$6M
SC 121 / 219 Interchanges	Cannon's Creek Wastewater Treatment Plant	Increase treatment capacity to 2.0 MGD, construct outfall to Broad River, additional collector lines, pump stations, and force mains	\$6.5M
Lake Murray	Lake Murray Water Treatment Plant Expansion	Expand plant to 3 MGD to meet industrial and commercial growth at all I-26 interchanges and residential growth at Lake Murray	\$3M
Wheeland and Macedonia Church Rd	Water Improvements	Install 12" water line from the intersection of Wheeland Rd and Macedonia Church Rd to the Town of Little Mountain	\$2.2M
Jalapa	Jalapa Water Storage Tank	Construct a 500,000 gallon water storage tank in the Jalapa area to support growth and enhanced fire protection for Jalapa area and I-26.	\$1.5M
Intersection of I-26 and SC 773	Water Storage Tank	Install a 500,000 gallon elevated water storage tank to serve future industrial growth	\$1.5M
Little Mountain	Water Storage Tank	Install a 500,000 gallon elevated water tank for future industrial growth on US 76, US 176 and SC 202 interchange at I-26	\$1.5M
Newberry	Water and Sewer Improvements	Upgrade old water and sewer lines in various locations throughout the City	\$8M
Newberry	Water Filtration Plant Expansion	Expand plant to treat another 3.4 MGD and construct elevated storage tank to serve Saluda County and the Town of Saluda	\$12M
Newberry	Water Filtration Plant	Construct 5 MGD clearwell to supplement the existing 2.5 MGD clearwell at the plant	\$7.5M
SC 202	Water Improvements	Install 12" water line along SC Hwy 202 from Four Oaks Rd to the intersection of US Hwy 176	\$1.1M
SC 219	Water Improvements	Install 12" water line along SC Hwy 219 from Halfacre Rd to the intersection of US 176 and Garmany Elementary School.	\$1.1M
SC 34 By-Pass (Dixie Drive)	Sewer Improvements	Install 8" sewer main along SC 34 from Nance Street to SC 121 to serve potential industrial sites	800,000
Triangle Area	Water Storage Tank	Provision of a 500,000 gallon elevated tank to the Triangle area between SC 34, SC 219 and I-26 east of Newberry	\$1M
US 76 Newberry to Prosperity	Sewer Improvements	Sewer service from Newberry to Prosperity to include 6,000 LF gravity sewer, 4,000 LF 4" and 6" force main, pump station	650,000
US 76 Scott's Creek to SC 34	Sewer Improvements	Replace existing north outfall sewer line from US 76 southeast along Scott's Creek to SC 34.	\$3.2M
US 76 to Bush River WWTP	Sewer Improvements	Construct a new outfall sewer line from US 76 to the Bush River WWTP to parallel south outfall sewer line	\$2.4M
Whitmire	Water Plant Expansion	Expansion of the Whitmire water filtration plant from 1.0 MGD to 1.5 MGD	\$2.5M

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APPENDIX A: SWOT SURVEY

CENTRAL MIDLANDS COUNCIL OF GOVERNMENTS

2011/2012 ECONOMIC DEVELOPMENT SURVEY

This survey is an effort to identify the economic development needs of the Central Midlands Region of South Carolina (Fairfield, Lexington, Newberry and Richland Counties). It is part of the Central Midlands Council of Government’s 2012-2017 Comprehensive Economic Development Strategy (CEDS) required by the U.S. Economic Development Administration (EDA). Your participation is greatly appreciated.

Tell Us About You: Please categorize yourself as one of the following.

Business Owner	<input type="checkbox"/>
Employee of a Private Business	<input type="checkbox"/>
Elected Official	<input type="checkbox"/>
Government	<input type="checkbox"/>
Non-Profit	<input type="checkbox"/>
Educator	<input type="checkbox"/>
Self-employed	<input type="checkbox"/>
Retired	<input type="checkbox"/>
Unemployed	<input type="checkbox"/>
Other (please specify)	<input type="checkbox"/>

Age	
19 - 24	<input type="checkbox"/>
25 - 44	<input type="checkbox"/>
45 - 64	<input type="checkbox"/>
65+	<input type="checkbox"/>

Race/Ethnicity (choose all that apply)	
Black	<input type="checkbox"/>
White	<input type="checkbox"/>
Hispanic	<input type="checkbox"/>
Other (please specify)	<input type="checkbox"/>

Where Do You Live?	
Fairfield County	<input type="checkbox"/>
Lexington County	<input type="checkbox"/>
Newberry County	<input type="checkbox"/>
Richland County	<input type="checkbox"/>
Other (please specify)	<input type="checkbox"/>

Where Do You Work?	
Fairfield County	<input type="checkbox"/>
Lexington County	<input type="checkbox"/>
Newberry County	<input type="checkbox"/>
Richland County	<input type="checkbox"/>
Other (please specify)	<input type="checkbox"/>

Highest Level of Education Completed	
High School Diploma / GED	<input type="checkbox"/>
Bachelor's Degree	<input type="checkbox"/>
Graduate Degree or Higher	<input type="checkbox"/>
Other (please specify)	<input type="checkbox"/>

Economic Strengths: Please select up to five (5) from the following that you think best characterize the Central Midlands Region’s greatest economic development strengths.

	Strength?
A well-trained workforce	<input type="checkbox"/>
Access/proximity to markets	<input type="checkbox"/>
Transportation network	<input type="checkbox"/>
Raw materials / natural resources	<input type="checkbox"/>
Renewable energy potential (wind, solar, geothermal, hydro, biomass)	<input type="checkbox"/>
Tourism assets	<input type="checkbox"/>
Strong existing businesses	<input type="checkbox"/>
Strong community leadership	<input type="checkbox"/>
Effective economic development organizations	<input type="checkbox"/>
Overall mix of employers	<input type="checkbox"/>
Local resources for capital – business loan funds, etc.	<input type="checkbox"/>
Local health care facilities	<input type="checkbox"/>
Technology / communications	<input type="checkbox"/>
Quality local / regional school system	<input type="checkbox"/>
Housing options	<input type="checkbox"/>
Attractive, livable communities	<input type="checkbox"/>
Other (please specify)	<input type="checkbox"/>
Comments:	

Economic Weaknesses: Please select up to five (5) from the following that you think best characterize the Central Midlands Region’s greatest economic development weaknesses or deficiencies.

	Weakness?
A well-trained workforce	<input type="checkbox"/>
Access/proximity to markets	<input type="checkbox"/>
Transportation network	<input type="checkbox"/>
Raw materials / natural resources	<input type="checkbox"/>
Renewable energy potential (wind, solar, geothermal, hydro, biomass)	<input type="checkbox"/>
Tourism assets	<input type="checkbox"/>
Strong existing businesses	<input type="checkbox"/>
Strong community leadership	<input type="checkbox"/>
Effective economic development organizations	<input type="checkbox"/>
Overall mix of employers	<input type="checkbox"/>
Local resources for capital – business loan funds, etc.	<input type="checkbox"/>
Local health care facilities	<input type="checkbox"/>
Technology / communications	<input type="checkbox"/>
Quality local / regional school system	<input type="checkbox"/>
Housing options	<input type="checkbox"/>
Attractive, livable communities	<input type="checkbox"/>
Other (please specify)	<input type="checkbox"/>
Comments:	

Economic Threats or Limitations: Please select up to five (5) from the following that you think most threaten or limit economic development potential in the Central Midlands Region.

	Threat?
Lack of affordable housing	<input type="checkbox"/>
Infrastructure deficiencies (i.e. roads, water/sewer, transmission lines, etc.)	<input type="checkbox"/>
Lack of labor force training opportunities	<input type="checkbox"/>
Lack of developable land and/or suitable buildings	<input type="checkbox"/>
Lack of community amenities (i.e. parks, community center, etc.)	<input type="checkbox"/>
Vacant Main Streets, town centers, and/or shopping areas	<input type="checkbox"/>
Volatility of business cycle (boom/bust)	<input type="checkbox"/>
Declining industries	<input type="checkbox"/>
Lack of access to capital	<input type="checkbox"/>
Lack of "living wage" jobs available	<input type="checkbox"/>
Excessive permitting fees & hostile regulatory environment	<input type="checkbox"/>
Ineffective existing government (local, state, federal)	<input type="checkbox"/>
Willingness of entrepreneurs to start or expand business	<input type="checkbox"/>
Other (please specify)	<input type="checkbox"/>
Comments:	

Economic Opportunities: Please select up to five (5) from the following that you think are the **best** potential economic opportunities in the Central Midlands Region.

	Opportunity?
Population growth	<input type="checkbox"/>
Skilled labor force	<input type="checkbox"/>
Available land	<input type="checkbox"/>
Access to transportation, air, highway, rail	<input type="checkbox"/>
Anchor industries or clusters	<input type="checkbox"/>
Proximity to research university	<input type="checkbox"/>
Specific demographic group – students, retirees, etc.	<input type="checkbox"/>
Tourism attractions	<input type="checkbox"/>
Vital Main Streets or downtowns	<input type="checkbox"/>
Natural resource base	<input type="checkbox"/>
Attractive communities / quality of life	<input type="checkbox"/>
Availability of water/sewer & other infrastructure resources	<input type="checkbox"/>
Other (please specify)	<input type="checkbox"/>
Comments:	

Economic Development Goals: Please select up to five (5) from the following that you think are the **best** measurable goals or strategies for economic development in the Central Midlands Region.

	Goal?
Diversify the economic base	<input type="checkbox"/>
Create new jobs that pay at least a "living wage"	<input type="checkbox"/>
Encourage the growth of existing businesses and industries	<input type="checkbox"/>
Create a strong entrepreneurial climate	<input type="checkbox"/>
Increase access to capital for new and existing businesses	<input type="checkbox"/>
Improve transportation infrastructure	<input type="checkbox"/>
Create a more business-friendly climate	<input type="checkbox"/>
Increase job skills of local labor force	<input type="checkbox"/>
Increase tourism activity	<input type="checkbox"/>
Assure access to technology resources and infrastructure	<input type="checkbox"/>
Encourage Main Street, downtown or town center revitalization	<input type="checkbox"/>
Improve the quality of life and community amenities	<input type="checkbox"/>
Improve the local/regional school system	<input type="checkbox"/>
Other (please specify)	<input type="checkbox"/>
Comments:	

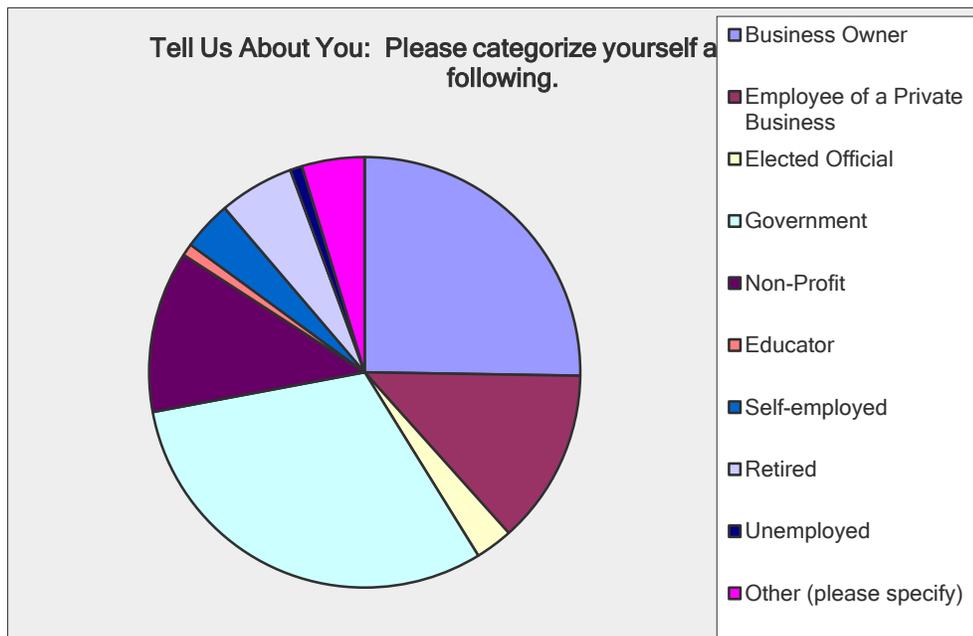
APPENDIX B: SURVEY RESULTS

2011/2012 ECONOMIC DEVELOPMENT SURVEY

Tell Us About You: Please categorize yourself as one of the following.

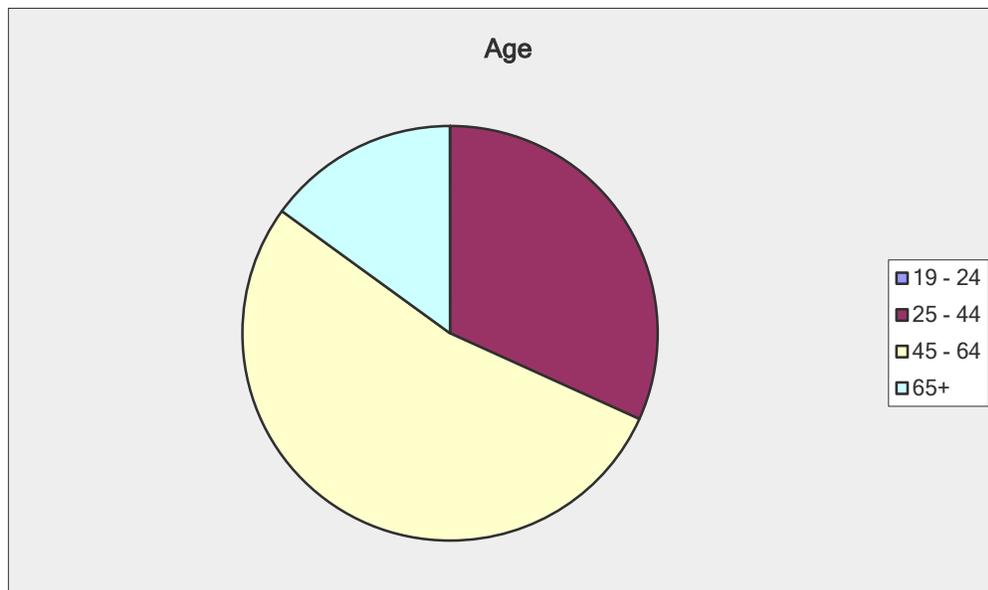
Answer Options	Response Percent	Response Count
Business Owner	25.2%	27
Employee of a Private Business	13.1%	14
Elected Official	2.8%	3
Government	30.8%	33
Non-Profit	12.1%	13
Educator	0.9%	1
Self-employed	3.7%	4
Retired	5.6%	6
Unemployed	0.9%	1
Other (please specify)	4.7%	5
<i>answered question</i>		107
<i>skipped question</i>		3

Number	Response Date	Other (please specify)	Categories
1	Apr 24, 2012 6:20 PM	Chamber of Commerce Executive	
2	Jan 4, 2012 5:39 PM	out of area ED professional	
3	Jan 4, 2012 4:48 PM	economic developer in another region	
4	Nov 8, 2011 8:03 PM	Economic Development Lender	
5	Nov 8, 2011 1:56 PM	University - Economic Development	



2011/2012 ECONOMIC DEVELOPMENT SURVEY

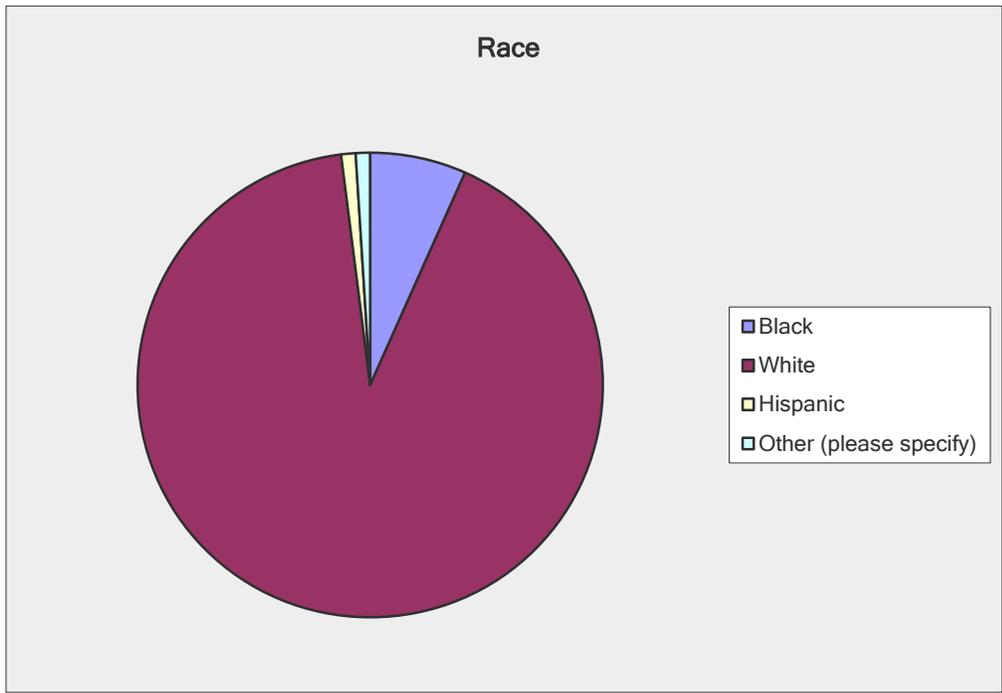
Age		
Answer Options	Response Percent	Response Count
19 - 24	0.0%	0
25 - 44	31.8%	34
45 - 64	53.3%	57
65+	15.0%	16
<i>answered question</i>		107
<i>skipped question</i>		3



2011/2012 ECONOMIC DEVELOPMENT SURVEY

Race		
Answer Options	Response Percent	Response Count
Black	6.7%	7
White	91.4%	96
Hispanic	1.0%	1
Other (please specify)	1.0%	1
<i>answered question</i>		105
<i>skipped question</i>		5

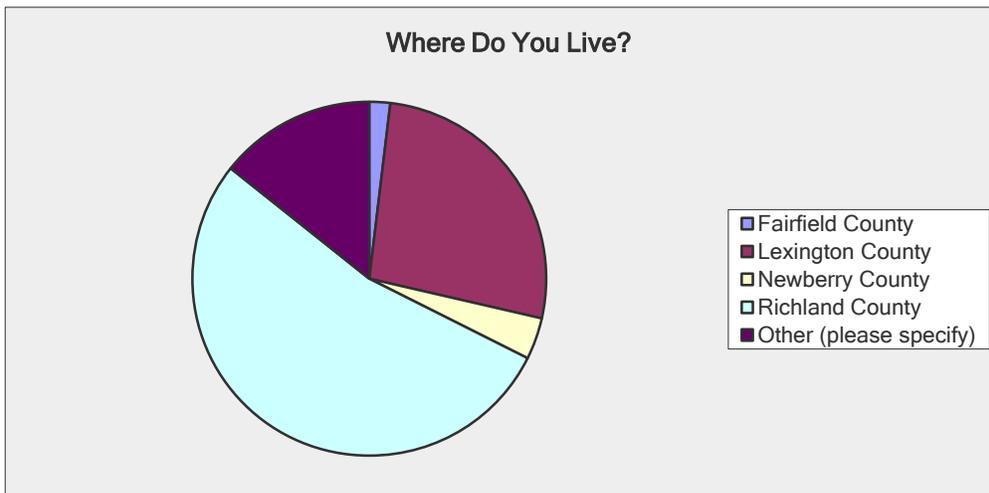
Number	Response Date	Other (please specify)	Categories
1	Jan 4, 2012 4:24 PM	American	



2011/2012 ECONOMIC DEVELOPMENT SURVEY

Where Do You Live?		
Answer Options	Response Percent	Response Count
Fairfield County	1.9%	2
Lexington County	26.7%	28
Newberry County	3.8%	4
Richland County	53.3%	56
Other (please specify)	14.3%	15
<i>answered question</i>		105
<i>skipped question</i>		5

Number	Response Date	Other (please specify)	Categories
1	Jan 4, 2012 8:02 PM	Berkeley	
2	Jan 4, 2012 5:45 PM	Greenville County	
3	Jan 4, 2012 5:39 PM	Greenwood	
4	Jan 4, 2012 4:48 PM	Sumter County	
5	Jan 4, 2012 4:44 PM	York County	
6	Jan 4, 2012 4:30 PM	Greenwood	
7	Jan 4, 2012 4:24 PM	Greenwood	
8	Jan 4, 2012 4:20 PM	Charleston County	
9	Nov 20, 2011 3:10 PM	kershaw county	
10	Nov 15, 2011 5:32 PM	Orangeburg County	
11	Nov 14, 2011 1:34 PM	Kershaw County	
12	Nov 11, 2011 6:52 PM	Greenwood County	
13	Nov 7, 2011 11:51 PM	Lancaster	
14	Nov 7, 2011 10:01 PM	Oconee	
		Charleston County - but have members in the counties listed above	
15	Nov 7, 2011 10:00 PM	above	



2011/2012 ECONOMIC DEVELOPMENT SURVEY

Where Do You Work?		
Answer Options	Response Percent	Response Count
Fairfield County	1.9%	2
Lexington County	14.3%	15
Newberry County	4.8%	5
Richland County	61.0%	64
Other (please specify)	18.1%	19
<i>answered question</i>		105
<i>skipped question</i>		5

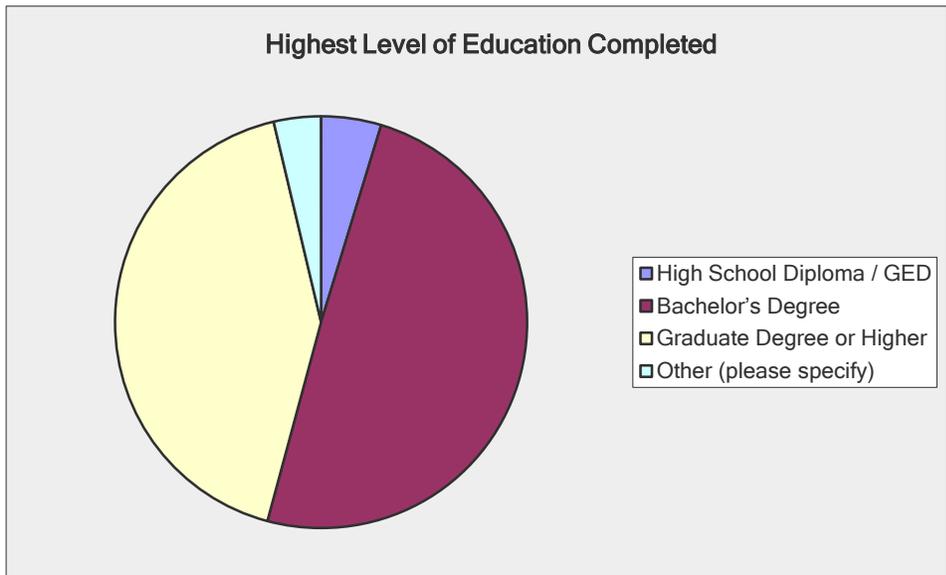
Number	Response Date	Other (please specify)	Categories
1	Apr 11, 2012 8:43 PM	All of South Carolina	
2	Jan 4, 2012 8:02 PM	State of SC	
3	Jan 4, 2012 6:32 PM	greenville	
4	Jan 4, 2012 5:45 PM	Greenville County	
5	Jan 4, 2012 5:39 PM	Greenwood	
6	Jan 4, 2012 4:48 PM	Sumter County	
7	Jan 4, 2012 4:44 PM	York County	
8	Jan 4, 2012 4:30 PM	Greenwood	
9	Jan 4, 2012 4:20 PM	Dorchester County	
10	Nov 20, 2011 3:10 PM	kershaw county	
11	Nov 15, 2011 5:32 PM	Orangeburg County	
12	Nov 10, 2011 2:40 PM	anywhere but cola - more & better biz opps elsewhere	
13	Nov 8, 2011 1:05 AM	LANCASTER	
14	Nov 7, 2011 11:51 PM	Lancaster	
15	Nov 7, 2011 10:01 PM	Oconee	
16	Nov 7, 2011 10:00 PM	Charleston Country - but have members in the counties listed above	
17	Nov 2, 2011 10:38 PM	Retired	
18	Nov 2, 2011 2:11 AM	retired	
19	Nov 2, 2011 12:08 AM	Retired	

2011/2012 ECONOMIC DEVELOPMENT SURVEY

Highest Level of Education Completed

Answer Options	Response Percent	Response Count
High School Diploma / GED	4.7%	5
Bachelor's Degree	49.5%	53
Graduate Degree or Higher	42.1%	45
Other (please specify)	3.7%	4
<i>answered question</i>		107
<i>skipped question</i>		3

Number	Response Date	Other (please specify)	Categories
1	Jan 4, 2012 4:16 PM	Professional Degree	
2	Nov 10, 2011 11:18 PM	Some graduate education	
3	Nov 2, 2011 10:38 PM	Some College	
4	Nov 1, 2011 6:46 PM	A.A.S	



2011/2012 ECONOMIC DEVELOPMENT SURVEY

Economic Strengths: Please select up to five (5) from the following that you think best characterize the Central Midlands Region's greatest economic development strengths.

Answer Options	Response Percent	Response Count
A well-trained workforce	30.7%	31
Access/proximity to markets	54.5%	55
Transportation network	56.4%	57
Raw materials / natural resources	5.9%	6
Renewable energy potential (wind, solar, geothermal,	4.0%	4
Tourism assets	17.8%	18
Strong existing businesses	26.7%	27
Strong community leadership	10.9%	11
Effective economic development organizations	19.8%	20
Overall mix of employers	31.7%	32
Local resources for capital - business loan funds, etc.	5.0%	5
Local health care facilities	50.5%	51
Technology / communications	20.8%	21
Quality local / regional school system	23.8%	24
Housing options	25.7%	26
Attractive, livable communities	48.5%	49
Other (please specify)	8.9%	9
<i>answered question</i>		101
<i>skipped question</i>		9

Number	Response Date	Other (please specify)
1	Apr 11, 2012 8:45 PM	Excellent second career professional pool of resources and knowledge
2	Jan 4, 2012 5:46 PM	Being fairly new to South Carolina, I do not have much familiarity with the Central Midlands.
3	Jan 4, 2012 4:22 PM	Affordable cost of living and housing
4	Nov 11, 2011 12:41 AM	exceptional drinking water
5	Nov 10, 2011 9:30 PM	Technical Education System
6	Nov 10, 2011 2:33 PM	Strong University presence
7	Nov 10, 2011 1:30 PM	low cost of living
8	Nov 8, 2011 6:45 PM	Research University -USC Midlands Tech
9	Nov 8, 2011 2:00 PM	Nationally ranked research university (only one in the state)

2011/2012 ECONOMIC DEVELOPMENT SURVEY

Economic Weaknesses: Please select up to five (5) from the following that you think best characterize the Central Midlands Region's greatest economic development weaknesses or deficiencies.

Answer Options	Response Percent	Response Count
A well-trained workforce	47.5%	47
Access/proximity to markets	6.1%	6
Transportation network	20.2%	20
Raw materials / natural resources	24.2%	24
Renewable energy potential (wind, solar, geothermal,	23.2%	23
Tourism assets	24.2%	24
Strong existing businesses	20.2%	20
Strong community leadership	58.6%	58
Effective economic development organizations	30.3%	30
Overall mix of employers	19.2%	19
Local resources for capital - business loan funds, etc.	44.4%	44
Local health care facilities	4.0%	4
Technology / communications	14.1%	14
Quality local / regional school system	47.5%	47
Housing options	7.1%	7
Attractive, livable communities	10.1%	10
Other (please specify)	12.1%	12
<i>answered question</i>		99
<i>skipped question</i>		11

Number	Response Date	Other (please specify)
1	Apr 11, 2012 8:47 PM	Entitlement and poverty mind setunable to percieve opportunities in communities of S.C.
2	Jan 6, 2012 7:00 PM	High cost of energy for manufacturers
3	Jan 4, 2012 5:46 PM	Do not know.
4	Jan 4, 2012 4:46 PM	does not embrace/proactively promote renewable energy
5	Jan 4, 2012 4:18 PM	The City of Columbia and Richland County are the most anti-business governments in the State of SC, and probably the Southeast. I work in many different markets, and doing business in Columbia and Richland County is by far the most excruciating experience I have.
6	Nov 14, 2011 1:36 PM	High cost of doing business.
7	Nov 10, 2011 2:33 PM	Diversity of transportation options
8	Nov 9, 2011 3:23 PM	Interest in protecting and preserving the environment- air, water, and physical environment

Economic Weaknesses: Please select up to five (5) from the following that you think best characterize the Central Midlands Region's greatest economic development weaknesses or deficiencies.

Number	Response Date	Other (please specify)
9	Nov 9, 2011 1:54 PM	Richland county and City of Columbia have ill-defined process and actual plan for permitting, zoning, We are slower and have too many barriers and hurdles to be competitive with other counties and states. Economic development arms of both make promises, that the staff level folks do not have a process to continue in the same manner.
10	Nov 9, 2011 2:36 AM	high taxes compared to rest of the state
11	Nov 8, 2011 9:30 PM	Lack of jobs for college graduates.
12	Nov 1, 2011 7:23 PM	Current development is driven by local elected persons that have never operated a business.(People who actually sign payroll checks and have to budget for all expenditures, more specifically gov't regulation cost) More business owners and corporate executive level decision makers is needed. Capital sales tax structure (overhaul) is needed for capital infrastructure improvements.

2011/2012 ECONOMIC DEVELOPMENT SURVEY

Economic Threats or Limitations: Please select up to five (5) from the following that you think most threaten or limit economic development potential in the Central Midlands Region.

Answer Options	Response Percent	Response Count
Lack of affordable housing	5.1%	5
Infrastructure deficiencies (i.e. roads, water/sewer,	43.9%	43
Lack of labor force training opportunities	22.4%	22
Lack of developable land and/or suitable buildings	17.3%	17
Lack of community amenities (i.e. parks, community	13.3%	13
Vacant Main Streets, town centers, and/or shopping	53.1%	52
Volatility of business cycle (boom/bust)	19.4%	19
Declining industries	32.7%	32
Lack of access to capital	44.9%	44
Lack of "living wage" jobs available	20.4%	20
Excessive permitting fees & hostile regulatory	40.8%	40
Ineffective existing government (local, state, federal)	56.1%	55
Willingness of entrepreneurs to start or expand business	20.4%	20
Other (please specify)	14.3%	14
<i>answered question</i>		98
<i>skipped question</i>		12

Number	Response Date	Other (please specify)
1	Apr 11, 2012 8:49 PM	In effective tax structure and a carpet beggars mentality of pittiful S.C.
2	Jan 6, 2012 7:00 PM	Excessively high energy costs for manufacturers and large businesses
3	Jan 4, 2012 5:46 PM	Do not know.
4	Jan 4, 2012 4:27 PM	Property Tax
5	Jan 4, 2012 4:19 PM	See prior response
6	Nov 29, 2011 6:54 PM	Uncooperative government entities -- i.e., Richland Co./City of Columbia; West Columbia/Cayce/Lexington/Columbia. In an effort to retain individual autonomy/identity, they sacrifice the good of the region -- transportation systems, streamlining of business permitting, cooperation between public service entities (police), etc.
7	Nov 11, 2011 7:09 PM	Lack of Skilled Workforce
8	Nov 10, 2011 9:33 PM	Lagging Community Vision
9	Nov 10, 2011 2:43 PM	lack of biz diversity
10	Nov 9, 2011 3:24 PM	Lack of affordable housing in safe neighborhoods

Economic Threats or Limitations: Please select up to five (5) from the following that you think most threaten or limit economic development potential in the Central Midlands Region.

Number	Response Date	Other (please specify)
11	Nov 8, 2011 6:47 PM	In fighting - crab bucket mentality - lack of business friendly goals -
12	Nov 8, 2011 2:01 PM	Central SC Alliance is underperforming. Drop-out rate is atrocious.
13	Nov 8, 2011 12:11 AM	Amount of government buildings, etc reduces property tax base and also reduces the number of private jobs therefore more public, lower paying jobs.
14	Nov 7, 2011 10:04 PM	feeling of uncertainty caused by the inability of the current Administration and Congress in Washington to get anything positive done

2011/2012 ECONOMIC DEVELOPMENT SURVEY

Economic Opportunities: Please select up to five (5) from the following that you think are the best potential economic opportunities in the Central Midlands Region.

Answer Options	Response Percent	Response Count
Population growth	45.3%	43
Skilled labor force	30.5%	29
Available land	41.1%	39
Access to transportation, air, highway, rail	65.3%	62
Anchor industries or clusters	22.1%	21
Proximity to research university	70.5%	67
Specific demographic group - students, retirees, etc.	28.4%	27
Tourism attractions	14.7%	14
Vital Main Streets or downtowns	13.7%	13
Natural resource base	9.5%	9
Attractive communities / quality of life	48.4%	46
Availability of water/sewer & other infrastructure	25.3%	24
Other (please specify)		2
<i>answered question</i>		95
<i>skipped question</i>		15

Number	Response Date	Other (please specify)
1	Jan 4, 2012 5:47 PM	Do not know.
2	Nov 29, 2011 6:56 PM	Central Midlands is so far behind the Upstate and Lowcountry - there's nowhere to go but up.

2011/2012 ECONOMIC DEVELOPMENT SURVEY

Economic Development Goals: Please select up to five (5) from the following that you think are the best measurable goals or strategies for economic development in the Central Midlands Region.

Answer Options	Response Percent	Response Count
Diversify the economic base	26.7%	24
Create new jobs that pay at least a "living wage"	31.1%	28
Encourage the growth of existing businesses and	65.6%	59
Create a strong entrepreneurial climate	43.3%	39
Increase access to capital for new and existing	42.2%	38
Improve transportation infrastructure	34.4%	31
Create a more business-friendly climate	56.7%	51
Increase job skills of local labor force	38.9%	35
Increase tourism activity	11.1%	10
Assure access to technology resources and	21.1%	19
Encourage Main Street, downtown or town center	37.8%	34
Improve the quality of life and community amenities	14.4%	13
Improve the local/regional school system	50.0%	45
Other (please specify)		4
<i>answered question</i>		90
<i>skipped question</i>		20

Number	Response Date	Other (please specify)
1	Apr 11, 2012 8:51 PM	STOP MAKING ENTITLEMENTS AND TAXES THE PATH FORWARD
2	Jan 4, 2012 5:54 PM	The term "living wage" is a subjective, politically divisive term often used by proponents of organized labor. I hope you will remove it from your survey and not include that type of language in your CEDS document. Who sets this minimum "living wage"? To subjectively drive up the cost of labor to higher than what the market demands for that input creates a surplus of applicants and shortage of jobs. Businesses search for substitutes to labor just as they would any other input that goes up in price. Western Europe's "living wage" has resulted in decades of U.S. Depression-level unemployment and a greatly diminished GDP. No thanks.
3	Nov 10, 2011 2:35 PM	Diversify multi-modal transportation options
4	Nov 9, 2011 2:39 AM	encourage business people to become more involved in local government

APPENDIX C: PUBLIC NOTICE

Central Midlands Council of Governments

2012-2017 Comprehensive Economic Development Strategy

Public Notice

The Central Midlands Council of Governments' Department of Community and Economic Development is pleased to announce the completion of the draft 2012-2017 Comprehensive Economic Development Strategy (CEDS), a five-year planning document. The CEDS document may be viewed at the Central Midlands offices at 236 Stoneridge Drive, Columbia, SC. The document will also be posted on the Central Midlands website at:

<http://www.centralmidlands.org/ceds2011reports.asp>

Comments may be mailed to: George Bistany, Central Midlands Council of Governments, 236 Stoneridge Drive, Columbia, SC 29210 or e-mailed to gbistany@cmcog.org. All comments must be received prior to **May 21, 2012**.

Posted: April 19, 2012

Location: Central Midlands Council of Governments' offices and www.cmcog.org

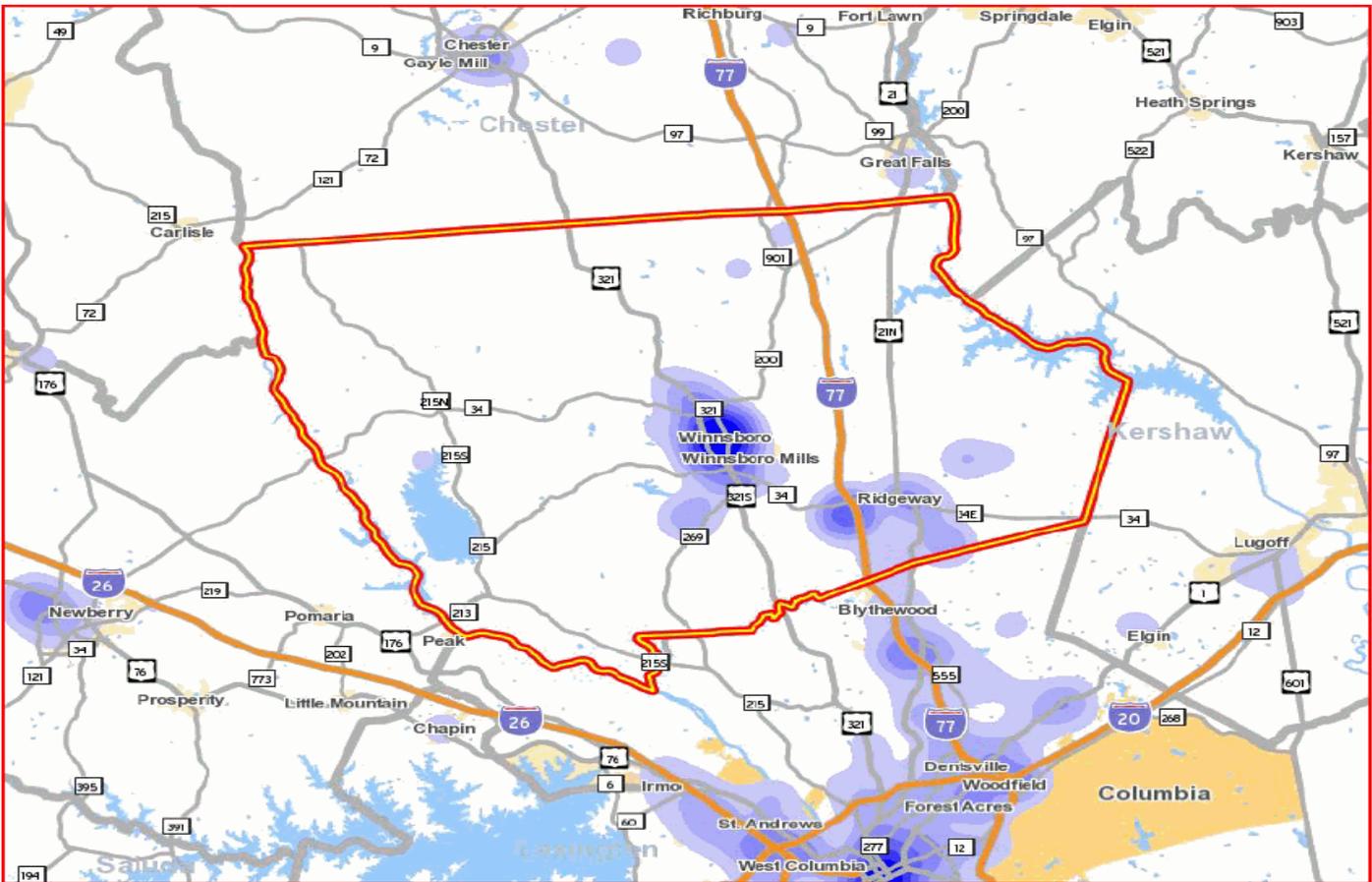
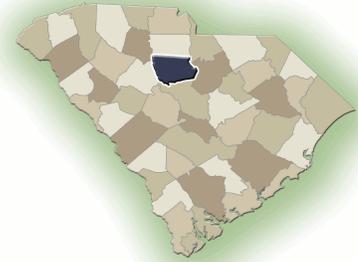
The Notice was also distributed via e-mail to area local governments and economic development agencies/officials.

APPENDIX D: COMMUTING PATTERNS



County Seat: Winnsboro

Website: www.fairfieldsc.com

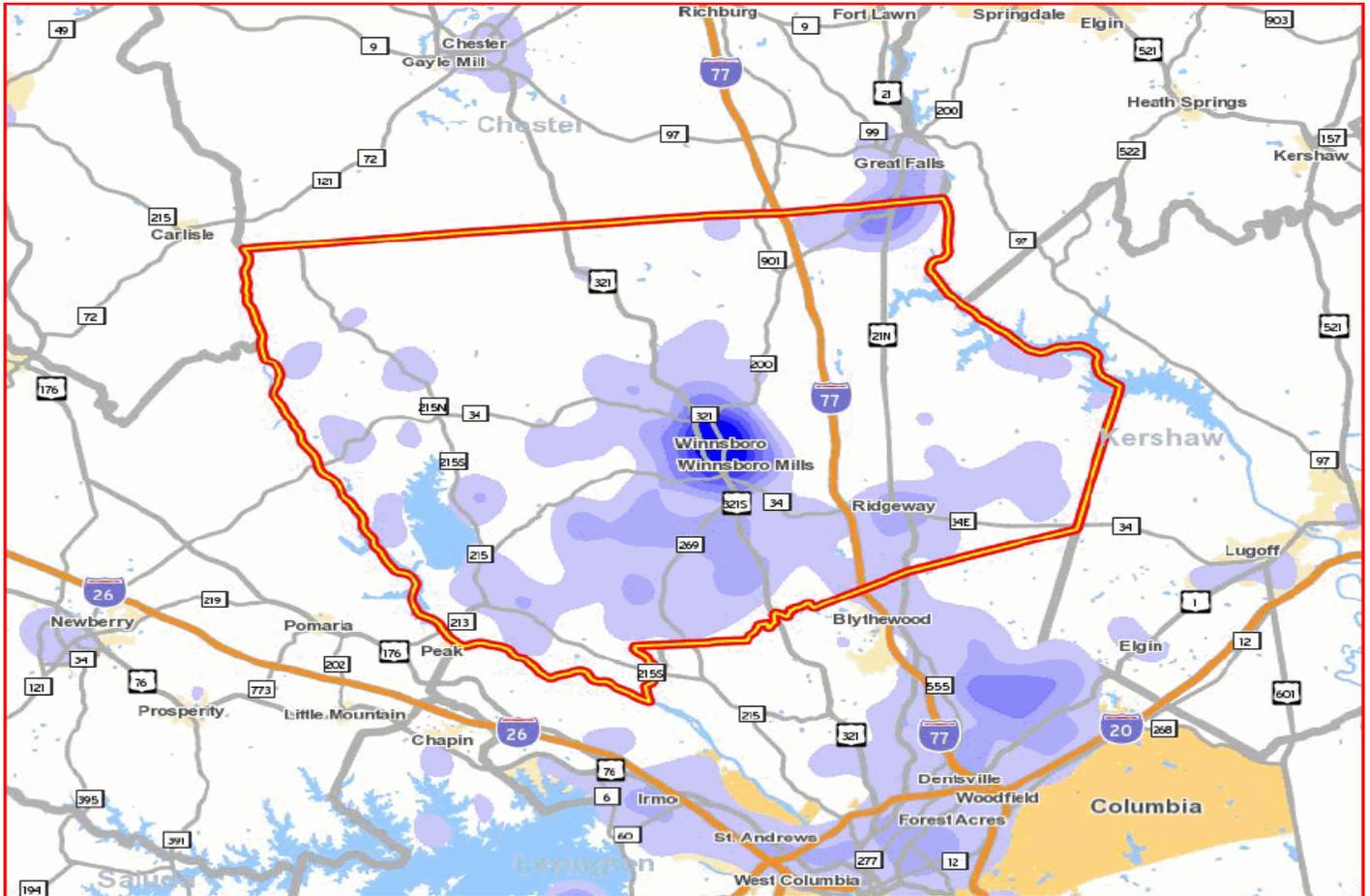


Where People Who Live in Fairfield County Work

33.10%	Richland County	South Carolina
23.40%	Fairfield County	South Carolina
9.20%	Lexington County	South Carolina
4.60%	Greenville County	South Carolina
4.50%	Spartanburg County	South Carolina
3.60%	York County	South Carolina
3.60%	Chester County	South Carolina
3.40%	Newberry County	South Carolina
1.90%	Kershaw County	South Carolina
1.30%	Lancaster County	South Carolina
11.30%	All Other Counties	

**Commuting
Patterns
2008**

Fairfield County



Where People who Work in Fairfield County Live

41.80%	Fairfield County	South Carolina
19.90%	Richland County	South Carolina
7.80%	Lexington County	South Carolina
3.60%	Chester County	South Carolina
3.10%	Newberry County	South Carolina
3.10%	Kershaw County	South Carolina
1.50%	Orangeburg County	South Carolina
1.50%	York County	South Carolina
1.20%	Charleston County	South Carolina
1.00%	Lancaster County	South Carolina
15.50%	All Other Counties	

Source: U.S. Census Bureau (Local Employment Dynamics)

**Commuting
Patterns**

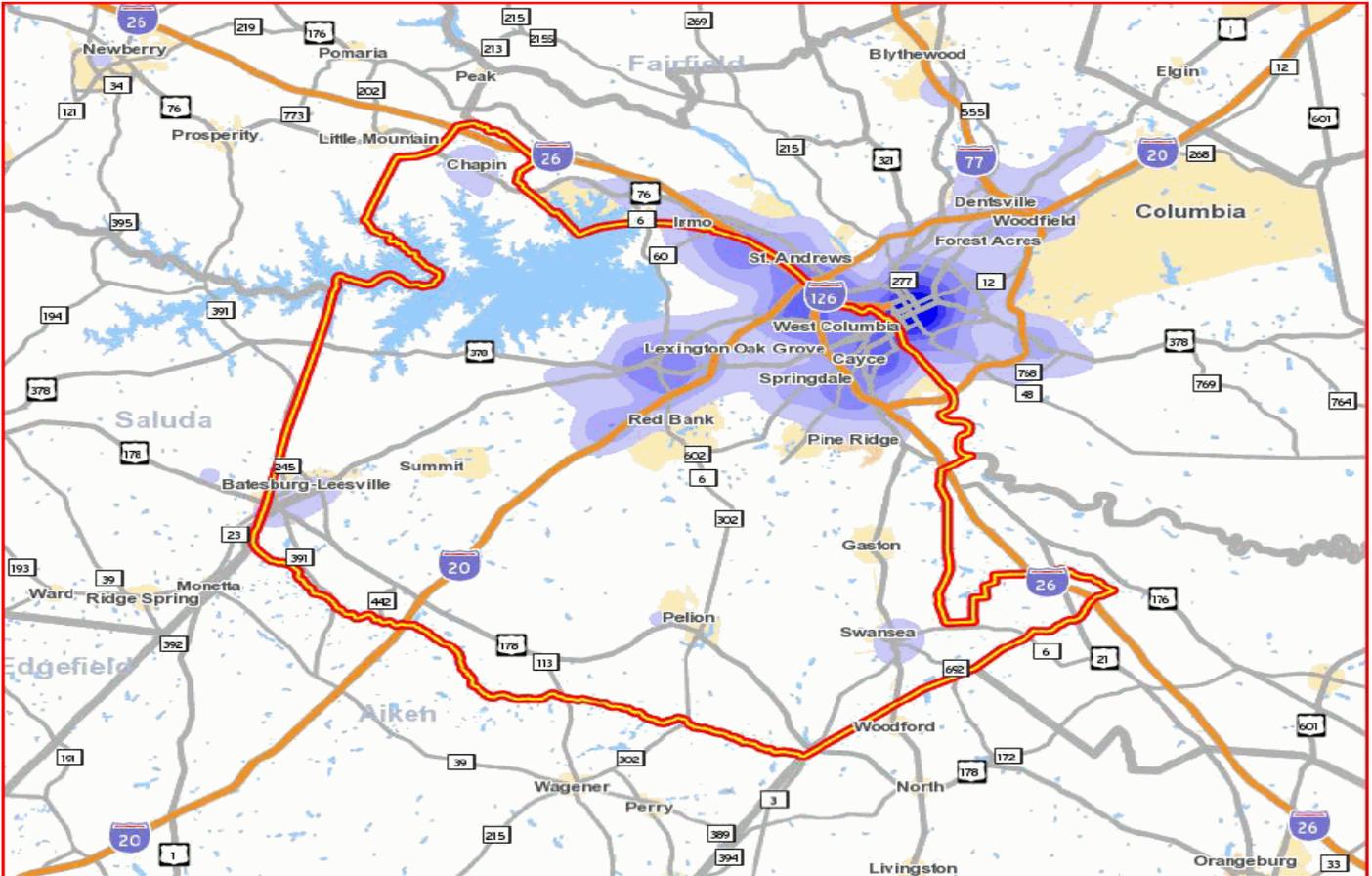
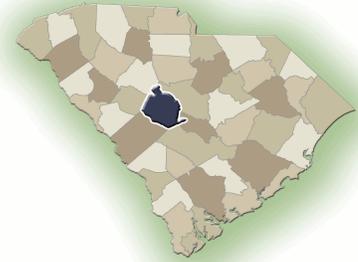
Lexington County

2008



County Seat: Lexington

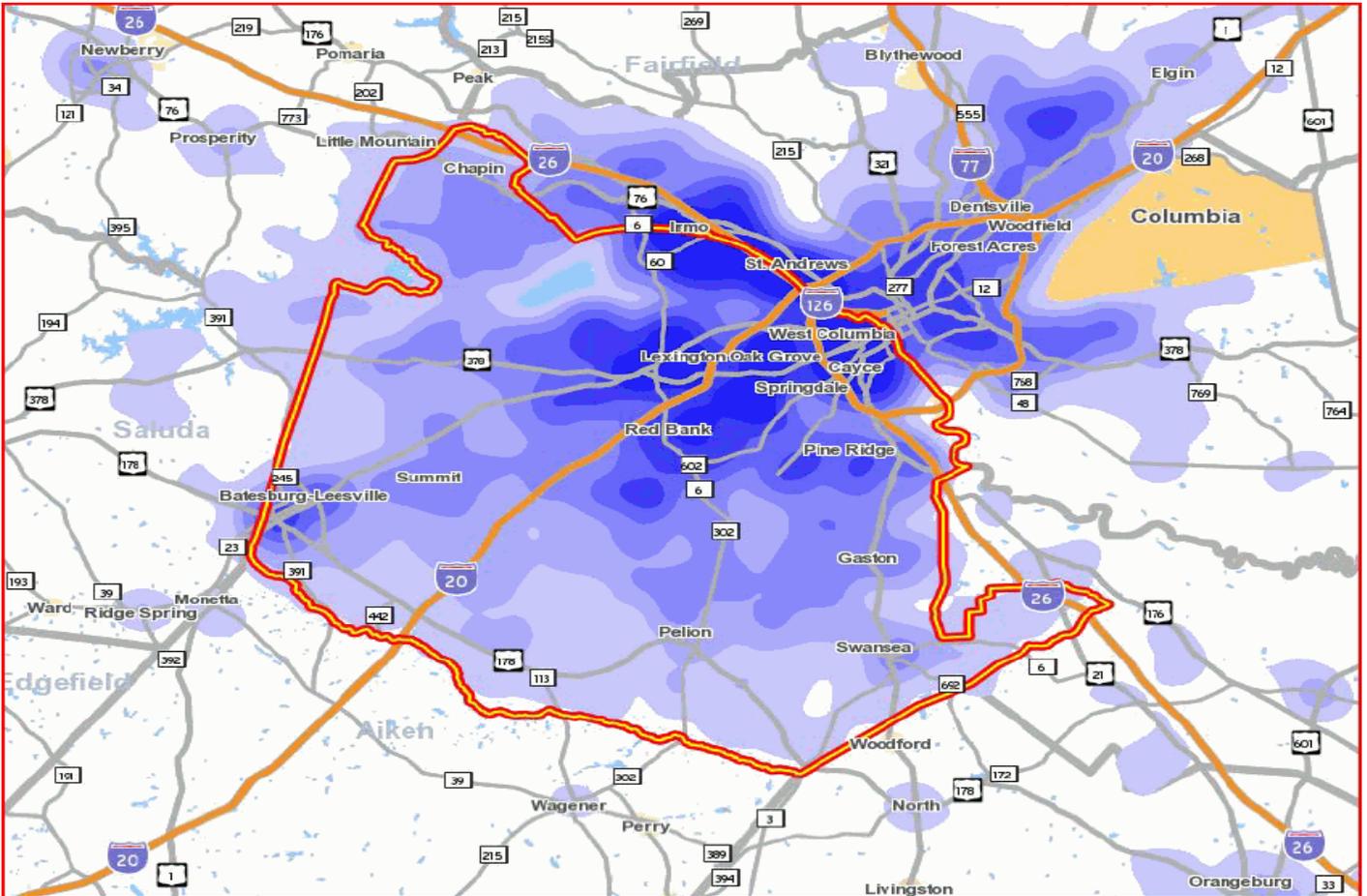
Website: www.lex-co.com



Where People Who Live in Lexington County Work

41.30%	Lexington County	South Carolina
38.20%	Richland County	South Carolina
3.00%	Greenville County	South Carolina
2.40%	Charleston County	South Carolina
1.50%	Spartanburg County	South Carolina
1.50%	Aiken County	South Carolina
1.20%	Orangeburg County	South Carolina
1.00%	Horry County	South Carolina
0.80%	Newberry County	South Carolina
0.70%	Florence County	South Carolina
8.30%	All Other Counties	

Lexington County

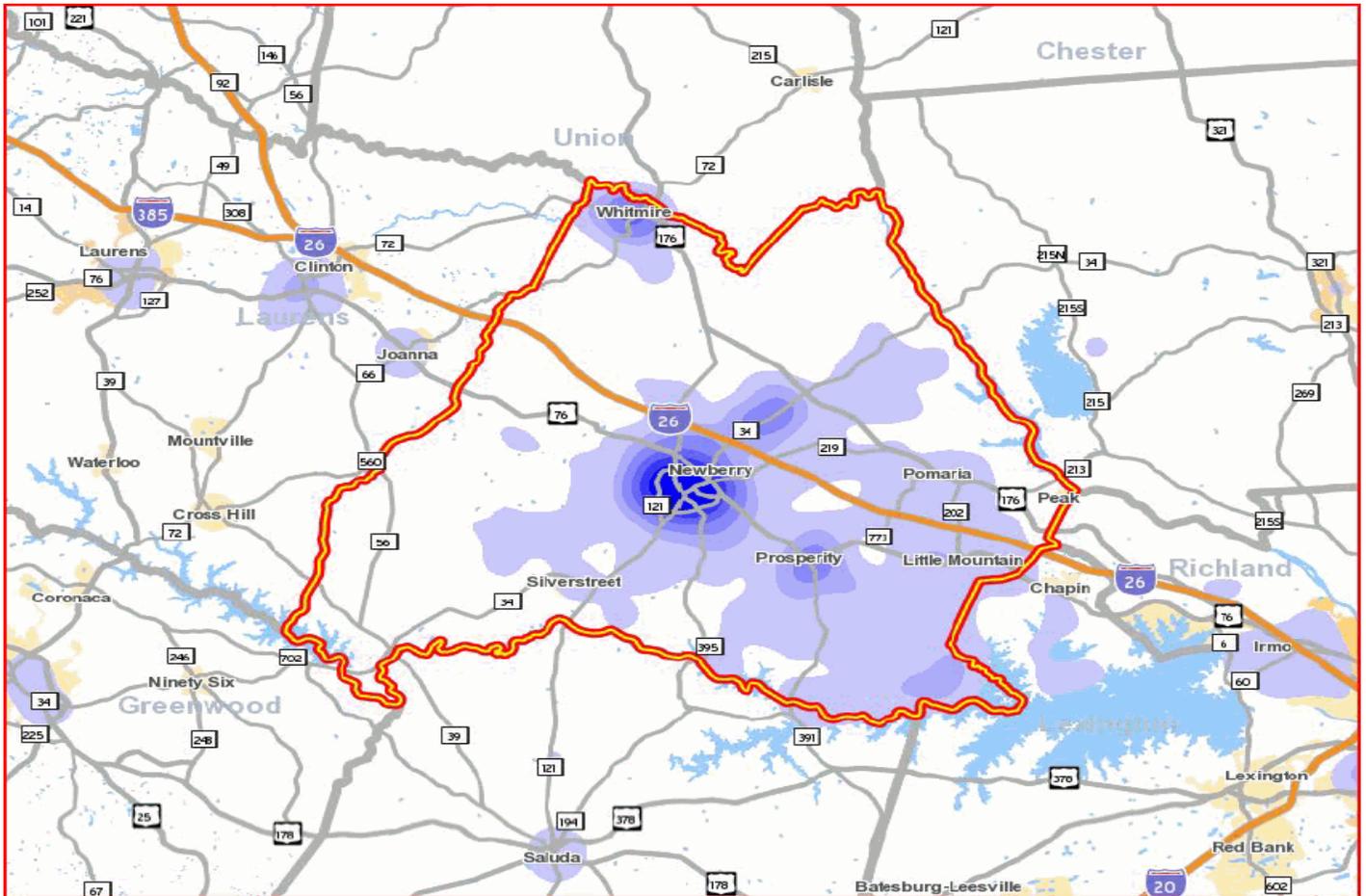


Where People who Work in Lexington County Live

45.10%	Lexington County	South Carolina
21.40%	Richland County	South Carolina
2.50%	Greenville County	South Carolina
2.30%	Aiken County	South Carolina
1.80%	Orangeburg County	South Carolina
1.70%	Charleston County	South Carolina
1.70%	Newberry County	South Carolina
1.60%	Spartanburg County	South Carolina
1.40%	Kershaw County	South Carolina
1.40%	Saluda County	South Carolina
19.00%	All Other Counties	

Source: U.S. Census Bureau (Local Employment Dynamics)

Newberry County



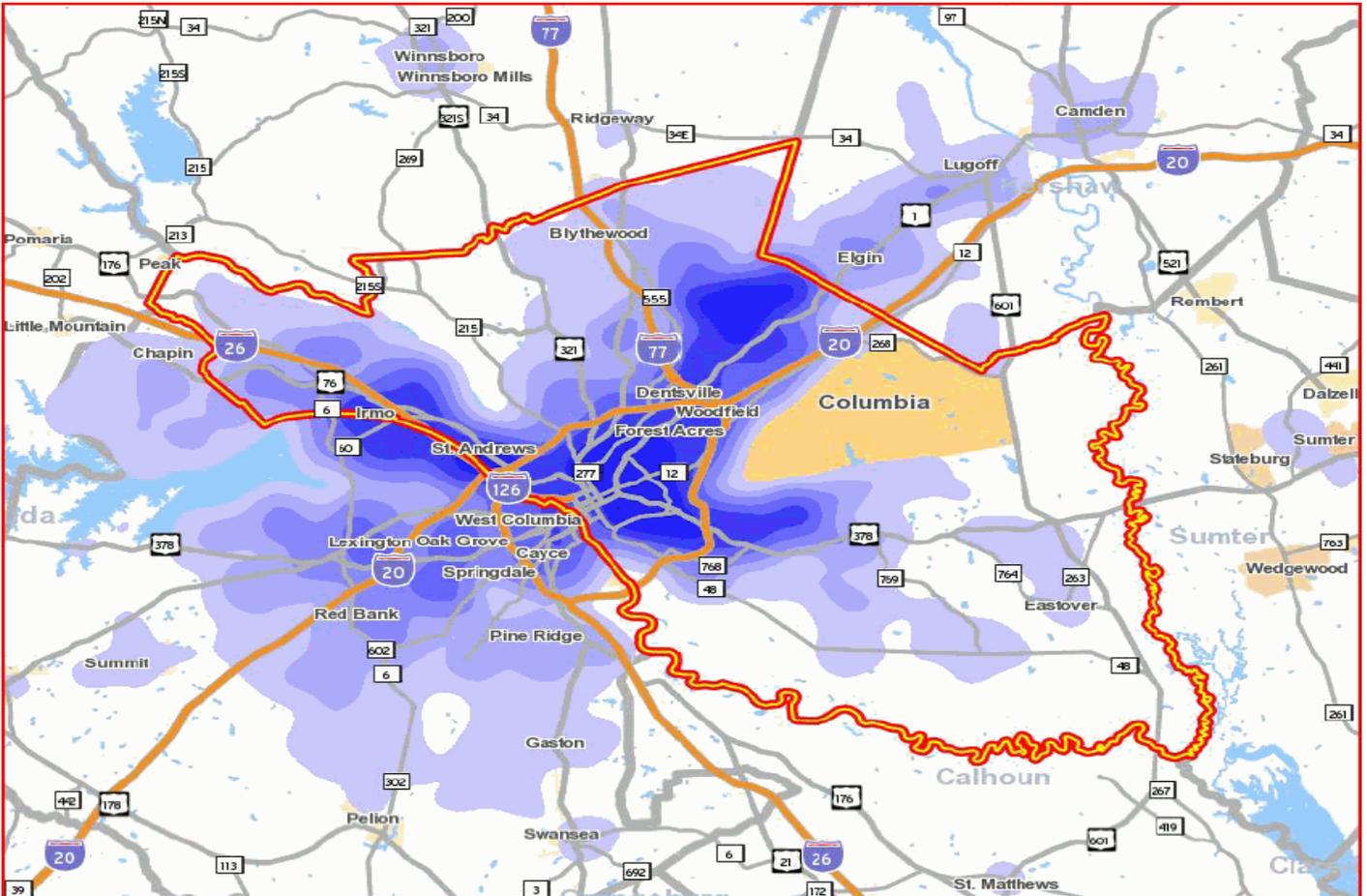
Where People who Work in Newberry County Live

53.80%	Newberry County	South Carolina
6.80%	Lexington County	South Carolina
5.90%	Richland County	South Carolina
5.20%	Laurens County	South Carolina
3.40%	Saluda County	South Carolina
2.70%	Union County	South Carolina
2.60%	Greenwood County	South Carolina
2.30%	Fairfield County	South Carolina
1.90%	Spartanburg County	South Carolina
1.70%	Greenville County	South Carolina
13.70%	All Other Counties	

Source: U.S. Census Bureau (Local Employment Dynamics)

**Commuting
Patterns
2008**

Richland County



Where People who Work in Richland County Live

44.60%	Richland County	South Carolina
20.20%	Lexington County	South Carolina
3.60%	Kershaw County	South Carolina
2.40%	Greenville County	South Carolina
2.10%	Charleston County	South Carolina
1.90%	Sumter County	South Carolina
1.70%	Horry County	South Carolina
1.70%	Orangeburg County	South Carolina
1.70%	Spartanburg County	South Carolina
1.40%	Fairfield County	South Carolina
18.70%	All Other Counties	

Source: U.S. Census Bureau (Local Employment Dynamics)

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APPENDIX E: COMPANIES

Selected Companies In Fairfield County, South Carolina- March 2012

Note: Ordered alphabetically by company name.

Company Name	City	County	Country	Product Description
Ben Arnold Sunbelt Beverage Co	Ridgeway	Fairfield	USA	Wine & distilled alcoholic beverages
Carolina Technical Fabrics	Ridgeway	Fairfield	USA	Fiberglass weaving & coated fabrics
Elite Electronic Systems	Winnsboro	Fairfield	Ireland	Contract electronics manufacturer
Fujicopian (USA) Inc	Winnsboro	Fairfield	Japan	Thermal transfer ribbons and graphic media products
Hacker Instruments Inc	Winnsboro	Fairfield		Manufactures laboratory apparatus
Isola USA Corp	Ridgeway	Fairfield	USA	Manufactures plastic products & printed circuit boards
Lang-Mekra North America LLC	Ridgeway	Fairfield	Germany	Mirror systems for commercial vehicles
MEKRA Tool & Mold	Ridgeway	Fairfield	Germany	Die & tool manufacturing
Midlands Biofuels LLC	Winnsboro	Fairfield		Used cooking oil collection for producing biodiesel
Palmetto Imaging Technology	Winnsboro	Fairfield		Solvent coating & manufacturing of film based ribbons & tapes
Performance Fibers Group	Winnsboro	Fairfield	USA	Manufactures tire cord
Phillips Granite Co	Winnsboro	Fairfield		Cut Stone & Stone Product Manufacturing
Prime Metal Coatings	Ridgeway	Fairfield		Powder coating
Safelite AutoGlass	Winnsboro	Fairfield	Belgium	Automotive glass replacement shop
Montana Biopolymers Inc	Winnsboro	Fairfield		Adhesives, eco-friendly polymers & related products
Infinity Foods	Winnsboro	Fairfield		Organic cereals

Source: SC Department of Commerce Records

Selected Companies In Lexington County, South Carolina- March 2012

Note: Ordered alphabetically by company name.

Company Name	City	County	Country	Product Description
680 Screened Tees	West Columbia	Lexington		Commercial Screen Printing
ABB	Irmo	Lexington	Switzerland	Manufactures power related transformers
Accufab Inc	West Columbia	Lexington		Steel fabrication
Garda	West Columbia	Lexington	Canada	Detective and armored car services
Actionable Decisions LLC	Lexington	Lexington		Business & technological solutions
ADM Signs	Lexington	Lexington		Sign Manufacturing
Akebono Brake Corporation	West Columbia	Lexington	Japan	Motor vehicle brake systems
Allied Air Enterprises Inc	West Columbia	Lexington	USA	Headquarters, commercial heating & cooling equipment
Alpha Manufacturing Co Inc	West Columbia	Lexington		Machine shop
American Engineering Consultants, Inc.	Cayce	Lexington		Engineering Firm
American Investors LLC (RECO USA)	West Columbia	Lexington	USA	Water heaters, pressure vessels & custom fabricated tanks
American Tool & Die Inc	Swansea	Lexington		Dies & die holders
Americast Inc	Lexington	Lexington	USA	Precast concrete storm drains & pipes
Amick Farms	Leesville	Lexington	USA	Processed poultry
Another Printer Inc	Columbia	Lexington		Commercial Lithographic Printing
Ansaldo STS USA	Batesburg-Leesville	Lexington	Italy	Railroad signaling equipment
Apex Tool Group LLC	Lexington	Lexington	USA	Headquarters (Division), electric & pneumatic tools
Allied Air Enterprises Inc	West Columbia	Lexington	USA	Air conditioning units, warm air heating equipment
Atlantic Coast Canvas Co	Lexington	Lexington		Canvas & Related Product Mills
Avtec Inc	Gilbert	Lexington		Designs, mfrs, & services mission critical radio consoles for command centers

Company Name	City	County	Country	Product Description
Barloworld Handling	West Columbia	Lexington	South Africa	Industrial equipment sales and leasing
Best Mattress Co Inc	West Columbia	Lexington		Manufactures mattresses
Bio-Medical Applications Management Co Inc	West Columbia	Lexington	Germany	Kidney Dialysis Centers
Blue Bell Creameries	Lexington	Lexington	USA	Distribution of ice cream products
Body Shop	Myrtle Beach	Lexington	France	Health and beauty aids
Carolina Custom Signs	West Columbia	Lexington		Manufactures signs & advertising specialties
Boral Bricks Inc	Lexington	Lexington	Australia	Brick and structural clay tile
Bruner Publishing Co Inc	Lexington	Lexington		Commercial Lithographic Printing
Cabinets By Design of South Carolina	Lexington	Lexington		Custom cabinetry
Cardinal Health	West Columbia	Lexington	USA	Nuclear pharmacy services
Carolina Fabricators Inc	West Columbia	Lexington		Fabricated structural metal manufacturing, meets nuclear NQA1 standards
Carolina Lantern Inc	Cayce	Lexington		Other Lighting Equipment Manufacturing
Carolina Retail Packaging, Inc.	Lexington	Lexington		Packaged distribution
Caughman's Meat Plant Inc	Lexington	Lexington		Animal (Except Poultry) Slaughtering
CEMEX	Lexington	Lexington	Mexico	Concrete building materials
Certified Translation Services, Inc	Columbia	Lexington		Translation services
Cerulium	Irmo	Lexington		HQ, computer training & consulting services, data warehousing
C E Taylor & Son Inc	Lexington	Lexington		Concrete product manufacturing
China Construction America of South Carolina Inc	Columbia	Lexington	China	General contracting
CMC Metal Recycling	Lexington	Lexington	USA	Metal recycling
CMC Metal Recycling	Cayce	Lexington	USA	Metal recycling
CMC Steel South Carolina	Cayce	Lexington	USA	Steel mini-mill making rebar, rounds, flats, etc.
CMI Industrial	West Columbia	Lexington	Australia	Distribution of brake components
Cole Vision Corp	Columbia	Lexington	Italy	Optical goods stores

Company Name	City	County	Country	Product Description
Columbia Farms Inc	Leesville	Lexington	USA	Poultry Processing
Columbia Tool & Die	West Columbia	Lexington		Metal fabrication & CNC machining
CoMar Products, Inc	Pelion	Lexington		Kitchen & bathroom countertops
Commercial Metals Co	West Columbia	Lexington	USA	Heat treating & distribution of metals
Composites Solutions Inc	West Columbia	Lexington		Composites
Corley, M L & Sons Sawmill Inc	Lexington	Lexington		Sawmills
C-Plex Inc	West Columbia	Lexington		Vacuum forming & CNC of custom plastic products
Crane America Services	Lexington	Lexington	Germany	Crane repair & service
Cullum Services Inc	Lexington	Lexington	USA	Air-Conditioning & Warm Air Heating Equipment & Commercial & Industrial Refrigeration Equipment Manufacturing
Custom Technology Of America	Swansea	Lexington		Other Ordnance & Accessories Manufacturing
DB Schenker	West Columbia	Lexington	Germany	Freight transportation arrangement
DHL Global Forwarding North America	West Columbia	Lexington	Germany	US customs brokerage & entry processing functions
Diamond Pet Foods	Gaston	Lexington	USA	Dog & cat food manufacturing
Dillon Supply Co	Conway	Lexington	France	Industrial supplies
Dixiana Steel Co Inc	West Columbia	Lexington		Fabricated Structural Metal Manufacturing
Do It Best	Lexington	Lexington		Distribution of tools & hardware
Dramer Inc	West Columbia	Lexington		Manufactures counter tops
D & T Steel Fabricators	Pelion	Lexington		Fabricated Structural Metal Manufacturing
Eagle Aviation Inc	West Columbia	Lexington		Aircraft service & refurbishing
Ellett Brothers Inc	Chapin	Lexington		Headquarters & distribution of sporting equipment
EMR Inc	Columbia	Lexington		Metal Stamping
Encore Boat Builders	Lexington	Lexington		Headquarters & pontoon manufacturing
Engineered Metals & Composites Inc	West Columbia	Lexington		Aluminum towers & small marine pdts for marine industry
Evans Steel	West Columbia	Lexington		Steel fabrication

Company Name	City	County	Country	Product Description
Fergon Tool & Machine Co Inc	Lexington	Lexington		All Other General Purpose Machinery Manufacturing
Ferguson Enterprises	Lexington	Lexington	United Kingdom	Supplier of plumbing fixtures
First Community Corporation	Lexington	Lexington		Commercial banking
Fisher Tank Co	Lexington	Lexington	USA	Metal Tank (Heavy Gauge) Manufacturing
Fitts Co Inc	Lexington	Lexington		Sign Manufacturing
Flextronics International	West Columbia	Lexington	Singapore	Electronic contract manufacturing incl NCR pdts
FPL Food LLC	West Columbia	Lexington	USA	Beef processing
FB Johnston Co Inc	Chapin	Lexington		Signs, decals & advertising specialties
Frito-Lay Inc	West Columbia	Lexington	USA	Other Snack Food Manufacturing
Gardener Easy Products Inc	Batesburg-Leesville	Lexington	USA	All Other Miscellaneous Wood Product Manufacturing
General Information Services	Chapin	Lexington		Headquarters, background screening & talent acquisition services
Gira Steel Inc	West Columbia	Lexington		Fabricated structural metal
Glassmaster Co	Lexington	Lexington		Fiberglass bay boats & fishing boats
Golden State Foods Corp	Lexington	Lexington		Food distribution for McDonalds
Hagemeyer North America Inc	West Columbia	Lexington	France	Distributor of electrical & industrial products
Hahl Inc	Lexington	Lexington	Austria	Cut plastic filaments, synthetic brushes & bristles
Lenscrafters Inc	Columbia	Lexington	Italy	Optical goods stores
Hammond Metal Fabricators	West Columbia	Lexington		Metal fabrication
Hansen International, Inc	Lexington	Lexington		Hardware & trim systems for commercial & industrial vehicles
Hardaway Concrete Co Inc	Lexington	Lexington		Ready-Mix Concrete Manufacturing
Harsco Track Technologies	West Columbia	Lexington	USA	Manufactures railroad equipment
Harvest Foods Inc	Lexington	Lexington		Food Broker
Helena Chemical Co	West Columbia	Lexington	Japan	Wholesale agricultural chemicals
Home Depot	Gaston	Lexington	USA	Distribution Center

Company Name	City	County	Country	Product Description
Hoover Trusses Inc	Lexington	Lexington		Truss Manufacturing
Husqvarna Outdoor Products Inc	Lexington	Lexington	Sweden	Distribution center for outdoor power equipment products
Icon Identity Solutions Inc	Lexington	Lexington	USA	Illuminated sign manufacturing
INC Engineered Materials	West Columbia	Lexington	Australia	Automotive acoustic insulation
Industrial Galvanizers	West Columbia	Lexington	United Kingdom	Galvanizers of iron & steel
InterContinental Hotels	West Columbia	Lexington	United Kingdom	Hotels and motels
Jackson-Elders Steel Co Inc	West Columbia	Lexington	USA	Stair & rail fabrication
Janpak Inc	West Columbia	Lexington	USA	Supplier of cleaning & packaging solutions
J B Martin Co	Leesville	Lexington	USA	Manufactures manmade fiber & woven velvets
J & J Machine & Specialty Inc	Lexington	Lexington		Machine Shop
John H Harland Co	West Columbia	Lexington	USA	Blankbook, Loose-Leaf Binders & Devices Manufacturing
John H Harland Co	West Columbia	Lexington	USA	Blankbook, Loose-Leaf Binders & Devices Manufacturing
KMS Inc	West Columbia	Lexington		Metal fabrication & powder coating
Knight Systems Inc	West Columbia	Lexington		All Other Rubber Product Manufacturing
Kyzer & Timmerman LLC	West Columbia	Lexington		Engineering firm
Lexington Printing	Lexington	Lexington		Commercial Lithographic Printing
Linder Industrial Machinery Co	West Columbia	Lexington	Japan	Construction and mining machinery
Lindler Mfg Co Inc	West Columbia	Lexington		Solid wood moulding
Lindquist Steels Inc	West Columbia	Lexington	USA	Steel service center
Loxscreen Co Inc	West Columbia	Lexington		Aluminum & plastic extrusions
Magna Sign Corp	Lexington	Lexington		Sign Manufacturing
Martint Inc	Lexington	Lexington		All Other Miscellaneous Chemical Product & Preparation Manufacturing
Mathias Sandwich Shop	Columbia	Lexington		All Other Miscellaneous Food Manufacturing
Matvest Inc	West Columbia	Lexington	USA	Cutting Tool & Machine Tool Accessory Manufacturing

Company Name	City	County	Country	Product Description
M E I Detailing Inc	Lexington	Lexington		Fabricated Structural Metal Manufacturing
MERMEC Inc	Columbia	Lexington	Italy	Measuring technology solutions for railway industry
Metal Works Inc	Lexington	Lexington		Fabricated Structural Metal Manufacturing
Metro Machine Works Inc	West Columbia	Lexington		Fabricated Structural Metal Manufacturing
Michelin North America Inc	Lexington	Lexington	France	Extra-large earthmover tires
Michelin North America Inc	Lexington	Lexington	France	Passenger & light truck tires
Mid-Carolina Solar Manufacturing	Lexington	Lexington		Alternative energy products
Midlands Woodwork LLC	Lexington	Lexington		Institutional Furniture Manufacturing
Midland Truss Inc	Batesburg-Leesville	Lexington		Truss Manufacturing
Midsouth Industrial	Irmo	Lexington		Industrial Process Furnace & Oven Manufacturing
Miracle Ear	West Columbia	Lexington	Italy	Hearing testing services
Monumental Life Insurance Co	West Columbia	Lexington	Netherlands	Life Insurance
Norandex Reynolds Distribution Inc	West Columbia	Lexington	France	Building materials
Nucor Building Systems	Swansea	Lexington	USA	Prefabricated Metal Building & Component Manufacturing
Oakwood Products	West Columbia	Lexington	United Kingdom	Chemical manufacturing
Berwick Offray	Batesburg-Leesville	Lexington	USA	Manufactures ribbon
Otis Spunkmeyer Inc	West Columbia	Lexington	Switzerland	Regional manufacturer of bakery products
OTS Manufacturing & Supply Inc	Lexington	Lexington		Safety flooring & surfaces for sport & recreation industries
Owen Electric Steel Co of S	West Columbia	Lexington		Iron & Steel Mills
Palmetto Wood Design	Chapin	Lexington		Wood Kitchen Cabinet & Countertop Manufacturing
Premier Graphics LLC	West Columbia	Lexington		Graphic services
PenServ Plan Services Inc	West Columbia	Lexington		Administration services for employee benefit plans
PepsiCo	West Columbia	Lexington		Soft Drinks

Company Name	City	County	Country	Product Description
Pexco Columbia	West Columbia	Lexington	USA	Extruded plastic components
Pine Press of Lexington	Lexington	Lexington		Quick Printing
PrintSouth Printing Inc	West Columbia	Lexington		Commercial Lithographic Printing
Prysmian Power Cables & Systems USA	Lexington	Lexington	Italy	Headquarters (NA) R&D, power cables for energy transmission
Special Care Medical Inc	Lexington	Lexington		Wholesale Medical/Hospital Equipment
Quadco Inc	Lexington	Lexington	Canada	Metal fabrication of wood harvesting equipment, service & distribution
Quikrete Co's Inc	West Columbia	Lexington	USA	Other Concrete Product Manufacturing
Randstad North America LP	Columbia	Lexington	Netherlands	Help Supply Services
Ready Mixed Concrete Co	Lexington	Lexington	Colombia	Concrete manufacturing
Recco Tape & Label Inc	West Columbia	Lexington		Commercial Flexographic Printing
Recordex Acquisition Corp	West Columbia	Lexington	USA	Quick Printing
Reddy Ice Corp	West Columbia	Lexington	USA	Ice Manufacturing
Republic National Distributing Co	West Columbia	Lexington		Wine & spirits distribution
Ridge Manufacturing Co Inc	Batesburg-Leesville	Lexington		Manufactures clip & basket racks for item displays
Roof Basket Works Inc	Lexington	Lexington		Wood Container & Pallet Manufacturing
RPM Engineers	Lexington	Lexington		Engineering services
RQ Laser & Plastics	West Columbia	Lexington		Plastic fabrication
Sam's Beer & More LLC	Lexington	Lexington		Breweries
Sara Lee Bakery Group Inc	West Columbia	Lexington	USA	Commercial Bakeries
SCANA (South Carolina Electric & Gas Co)	Cayce	Lexington		Electric power generation & gas distribution
Schnabel Engineering	West Columbia	Lexington		Engineering services
School Cuts Screening	West Columbia	Lexington		Broadwoven Fabric Finishing Mills
Sea-Hunt Boat Manufacturing Co Inc	Lexington	Lexington		Boatbuilding and repairing
Setcrete Inc	Gilbert	Lexington		Other Concrete Product Manufacturing

Company Name	City	County	Country	Product Description
Sign-Fab Inc	West Columbia	Lexington		Sign Manufacturing
Signtech Industries Inc	Lexington	Lexington		Sign Manufacturing
SimplexGrinnell	West Columbia	Lexington	Switzerland	Installation & service of fire, security & communications equipment
Sloan Construction Co Inc	Cayce	Lexington	France	Highway and bridge construction
Sneaks Unlimited	Pelion	Lexington		Fiberglass fishing boats
Sonus-USA Inc	West Columbia	Lexington	Italy	Hearing aid clinics
South Carolina Farm Bureau	Cayce	Lexington		Fire, marine, & agricultural insurance
SouthConn Technologies Inc	West Columbia	Lexington		Relay & Industrial Control Manufacturing
Southeastern Equipment & Supply	West Columbia	Lexington		Professional floor cleaning equipment
Southeastern Freight Lines	Lexington	Lexington		LTL Service
Southern Glass & Metal LLC	Lexington	Lexington		Glass Product Manufacturing Made Of Purchased Glass
Sox Racing	West Columbia	Lexington		Racing karts manufacturing & service
Sparta Imports Inc	West Columbia	Lexington		Distribution of Greek style products
Specialty Concrete Products	West Columbia	Lexington		Other Concrete Product Manufacturing
Stanick Sheetmetal & Roofing	Columbia	Lexington		Sheet Metal Work Manufacturing
SIOS Technology Corp	Lexington	Lexington	Japan	Computer data keeping & recovery systems
Steel Group LLC	West Columbia	Lexington		Fabricated Structural Metal Manufacturing
Sunbelt Rentals	Cayce	Lexington	United Kingdom	Equipment rental Co
Sun Printing	West Columbia	Lexington		Custom printing services
Targetec Inc	Lexington	Lexington		Scientific & engineering laser instruments
TCM Manufacturing USA Inc	West Columbia	Lexington	Japan	Industrial truck, tractor, trailer & stacker machinery
Team IA	Lexington	Lexington		Software development & information services
Teleperformance	Columbia	Lexington		Customer and technical support call center
Temple-Inland	Lexington	Lexington	USA	Corrugated box manufacturing

Company Name	City	County	Country	Product Description
Tire Kingdom Inc	Lexington	Lexington	Japan	Tire retreading and repair shops
Professional Printers	West Columbia	Lexington		Offset & digital printing
Tube City IMS	Cayce	Lexington	Canada	Scrap & waste metal management
T V S Manufacturing Specialists	Leesville	Lexington		Manufactures magnetic components & battery cables
United Parcel Service	West Columbia	Lexington	USA	Regional Air Hub
United Parcel Service	West Columbia	Lexington	USA	Ground Hub
US Foodservice Inc	Lexington	Lexington		General Line Grocery Merchant Wholesalers
UTi Integrated Logistics Inc	Gaston	Lexington	British Virgin Islands	Warehousing and storage
UTi Integrated Logistics Inc	West Columbia	Lexington	British Virgin Islands	Warehousing and storage
Wentworth Printing	West Columbia	Lexington	USA	Offset & digital printing
West Star Aviation	West Columbia	Lexington	USA	Airframe repair & maintenance, avionics installation & repair, interior refurbishment
Wilbert Columbia Vault Co	Cayce	Lexington		Concrete burial vaults
W R Medlin Co Inc	West Columbia	Lexington		Fabricated Structural Metal Manufacturing
WW Williams Co	West Columbia	Lexington		Remanufacture & service of diesel engines, distribution of industrial parts
Corrugated Containers Inc	Cayce	Lexington		Supplier of boxes, cartons & other packaging equipment
Interstate Container	Columbia	Lexington	USA	Recyclable corrugated boxes for food product shipping
Metals & Alloys Co LLC	Lexington	Lexington		Metal service center
Truss Link Inc	Irmo	Lexington		Light gauge roof systems & structural framing
Amazon.com Inc	Cayce	Lexington	USA	Distribution center
Time Warner Cable Inc	West Columbia	Lexington	USA	Customer service center, digital cable & high-speed data services
Performance Strength Designs	West Columbia	Lexington		Designs, manufactures & installs exercise equipment
TD Bank	Lexington	Lexington	Canada	Commercial bank

Source: SC Department of Commerce Records

Selected Companies In Newberry County, South Carolina- March 2012

Note: Ordered alphabetically by company name.

Company Name	City	County	Country	Product Description
Aqua Products Co Inc	Prosperity	Newberry		Small tonnage chiller systems
ArctiChill	Newberry	Newberry	Canada	Cooling systems for aviation, military & medical applications
BFS Retail & Commercial Operations LLC	Newberry	Newberry	Japan	Automotive tire dealer
Carolina Concrete Co Inc	Newberry	Newberry	USA	Ready-Mix Concrete Manufacturing
Carsonite Composites LLC	Newberry	Newberry	Netherlands	Fiberglass light poles & signs
Caterpillar Electric Power	Newberry	Newberry	USA	Manufactures diesel gensets
Pioneer Food South Carolina	Prosperity	Newberry	USA	Flour Milling
Comfort Care Products Inc	Newberry	Newberry		Mattress manufacturing
Counts Sausage Co Inc	Prosperity	Newberry		Meat Processed From Carcasses
Dalkotech SC	Newberry	Newberry	Canada	Robotically welds large frame components
Doncasters Trucast Inc	Newberry	Newberry	United Kingdom	Turbocharger wheels & components
Fraser West Timber Co Ltd	Newberry	Newberry	Canada	Sawmills
Fresenius Medical Care	Newberry	Newberry	Germany	Kidney dialysis center
Georgia-Pacific LLC	Prosperity	Newberry	USA	Southern pine plywood
Industrial Pine Products Inc	Newberry	Newberry	USA	Manufactures tropical hardwood decking products
International Paper Co	Prosperity	Newberry	USA	Lumber
International Paper Co Inc	Silverstreet	Newberry	USA	Cut Stock, Resawing Lumber & Planing
ISE America Inc	Newberry	Newberry	Japan	Egg processing & products
KapStone Paper & Packaging	Kinards	Newberry		Pulp Mills
Kiswire Inc	Newberry	Newberry	Korea, Republic of	Bead wire

Company Name	City	County	Country	Product Description
Komatsu America Corp	Newberry	Newberry	Japan	Construction Machinery Manufacturing
K T Manufacturing Inc	Prosperity	Newberry		Manufactures pet beds & related products
Louis Rich Co	Newberry	Newberry	USA	Poultry Processing
Maclean Fiberglass	Newberry	Newberry	USA	All Other Plastics Product Manufacturing
McKechnie Vehicle Components	Newberry	Newberry	USA	Automotive wheel trims
Metal Masters Inc	Newberry	Newberry		Machine Shop
Mulkey Inc	Newberry	Newberry		Engineering Firm
Nasmyth Precision Products Inc	Newberry	Newberry	United Kingdom	Headquarters (NA), aerospace electrical connector components
Olympian Generator	Newberry	Newberry	USA	Distribution of gas and diesel generator sets
Packaging Corp Of America	Newberry	Newberry	USA	Corrugated & Solid Fiber Box Manufacturing
Palmetto Pallette Co Inc	Newberry	Newberry		Wood Container & Pallet Manufacturing
Pleasurecraft Engine Group	Little Mountain	Newberry	USA	Manufactures marine engines
PSM Fastener Corp	Newberry	Newberry	Sweden	Distribution of fasteners
Quality Woodtruss Inc	Newberry	Newberry		Truss Manufacturing
Quality Woodworks Inc	Newberry	Newberry		Wood Container & Pallet Manufacturing
Red Line Precision Machining	Prosperity	Newberry		Machine Shop
Schweitzer - Mauduit	Newberry	Newberry	USA	Banded cigarette papers
Shakespeare Composite Structures	Newberry	Newberry	Netherlands	Composite utility poles

Source: SC Department of Commerce Records

Selected Companies In Richland County, South Carolina- February 2011

Note: Ordered alphabetically by company name.

Company Name	City	County	Country	Product Description
AAA Signs-Judy Manufacturing	Columbia	Richland		Sign manufacturing
ATI Systems	Columbia	Richland	Canada	Detective and armored car services
Accutech Machine	Blythewood	Richland		Machine Shop
AcroSoft	Columbia	Richland	USA	Insurance management services
Action Rubber & Gasket Co	Columbia	Richland		Gasket, packing & sealing sevice manufacturing
Adecco USA Inc	Columbia	Richland	Switzerland	Employment services
ADT Security Services Inc	Columbia	Richland	Switzerland	Security systems services
Affinity Technology Group Inc	Columbia	Richland		Financial software
Allen Brothers Milling Co Inc	Columbia	Richland		Flour Milling
Alliance Consulting Engineers	Columbia	Richland		Engineering firm
Allied Metal Fabricators	Columbia	Richland		Custom metal fabrication
Allscripts	Columbia	Richland	United Kingdom	Healthcare information technology
AMBAC International Corp	Elgin	Richland		Diesel fuel injection systems
Ancor Rigid Plastics	Blythewood	Richland	Australia	Plastic bottles
American Italian Pasta Co Inc	Columbia	Richland	USA	All Other Miscellaneous Food Manufacturing
American Solid Woven Corp	Columbia	Richland	USA	Headquarters, belting & engineered fabrics for auto, aerospace & other industries
American Spiralweld Pipe Co	Columbia	Richland	USA	Iron & Steel Pipes & Tubes Manufacturing From Purchased Steel
Cole Vision Corp	Columbia	Richland	Italy	Optical goods stores
Anchor Industries Inc	Columbia	Richland		Enameled Iron & Metal Sanitary Ware Manufacturing
Andron Stainless Corp	Columbia	Richland	Canada	Stainless steel fittings

Company Name	City	County	Country	Product Description
BC Engineering and Design LLC	Columbia	Richland		Engineering Firm
BDI Pharma Inc	Columbia	Richland		Distributes pharmaceuticals to healthcare & veterinary industries
Belk Distribution Center	Blythewood	Richland		Department store goods
Beneficial	Columbia	Richland	United Kingdom	Financial services
BFS Retail & Commercial Operations LLC	Columbia	Richland	Japan	Automotive tire dealer
BFS Retail & Commercial Operations LLC	Columbia	Richland	Japan	Automotive tire dealer
BFS Retail & Commercial Operations LLC	Columbia	Richland	Japan	Automotive tire dealer
BFS Retail & Commercial Operations LLC	Columbia	Richland	Japan	Automotive tire dealer
BFS Retail & Commercial Operations LLC	Columbia	Richland	Japan	Automotive tire dealer
BFS Retail & Commercial Operations LLC	Columbia	Richland	Japan	Automotive tire dealer
Biomatics LLC	Columbia	Richland		Hyper-spectral wound imaging
Bio-Medical Applications Management Co Inc	Columbia	Richland	Germany	Kidney Dialysis Centers
Blue Choice Health Plan of SC	Columbia	Richland	USA	Health maintenance organization
BlueCross BlueShield of SC	Columbia	Richland	USA	Insurance
Bonitz Inc	Columbia	Richland		Prefabricated Metal Building & Component Manufacturing
BoroScience International Inc	Columbia	Richland		Research in boron chemistry & distribution of boron compounds
Bose Corp	Blythewood	Richland	USA	Audio equipment manufacturing
BP Barber	Columbia	Richland		Engineering Firm
Braemar Distribution	Columbia	Richland	USA	Sales, customer service, technical support, & distribution for medical devices
Bridge to Life Ltd	Columbia	Richland		Headquarters, organ transplantation biotechnology
Brown's Bindery Inc	Columbia	Richland		Tradebinding & Related Work
Buck Enterprises LLC	Blythewood	Richland	Germany	Damper cushions & steel wire parts
Cole Vision Corp	Columbia	Richland	Italy	Optical goods stores

Company Name	City	County	Country	Product Description
Builders Engineering Corp	Columbia	Richland		Engineering Firm
Business Cards Tomorrow	Columbia	Richland		Other Commercial Printing
Business Vitals LLC	Columbia	Richland		IT risk management solutions
BWI Distribution	Columbia	Richland	USA	Distribution of safety & insulation products
Cabinet Shop Of Columbia Inc	Columbia	Richland		Other Millwork (Including Flooring)
Cable Conveyor Systems Inc	Columbia	Richland		Mechanical Power Transmission Equipment Manufacturing
Capital City Insurance Co	Columbia	Richland		Fire, marine & casualty insurance
Carlisle Associates Inc	Columbia	Richland		Engineering Firm
C C G Corp	Lugoff	Richland		Brake linings
Carolina Ceramics Brick Co	Columbia	Richland		Brick & stone products
Carolina Specialty Chemicals	Blythewood	Richland		Supplier & consultant of specialty chemicals
Carrier Corp	Columbia	Richland	USA	Air-Conditioning & Warm Air Heating Equipment & Commercial & Industrial Refrigeration Equipment Manufacturing
CEMEX	Blythewood	Richland	Mexico	Concrete building materials
Century Fasteners	Columbia	Richland	USA	Stocking center for industrial supplies
CGI Technology and Solutions Inc	Columbia	Richland	Canada	Computer related services
Champion Concrete Co LLC	Columbia	Richland		Ready-Mix Concrete Manufacturing
Chao & Associates	Columbia	Richland		Engineering Firm
Chatham Manufacturing Inc	Columbia	Richland		Broadwoven Fabric Mills
Chatham Steel Corp	Columbia	Richland	USA	Steel products & components
Childtime Childcare Inc	Columbia	Richland	Australia	Child day care services
Chipco Computer Distributors Inc	Columbia	Richland		Personal computers & laptops
Circle Environmental	Columbia	Richland		Lease of absorbent materials to industry for cleaning and degreasing
Civil Engineering Consulting Services Inc	Columbia	Richland		Engineering Firm
Classic Concepts Inc	Chapin	Richland		Rubber Product Manufacturing For Mechanical Use

Company Name	City	County	Country	Product Description
CMC Construction Services	Columbia	Richland	USA	Supplier of concrete accessories
CMC Rebar Carolinas	Columbia	Richland	USA	Fabricated rebar including dowel bars, mesh & bar supports
CMC Steel Fabricators Inc	Eastover	Richland	USA	Steel joists
Coburg Dairy	Columbia	Richland	Mexico	Fluid milk manufacturing
Coca-Cola Bottling Co	Blythewood	Richland	USA	Soft Drink Manufacturing
Cole Vision Corp	Columbia	Richland	Italy	Optical goods stores
Collexis Holdings Inc	Columbia	Richland	Netherlands	Semantic search software development
Colonial Life & Accident Insurance Co	Columbia	Richland		Insurance
Compass Group USA	Columbia	Richland	United Kingdom	Food services
Columbia Caststone Inc	Columbia	Richland		Other Concrete Product Manufacturing
Companion Data Services LLC	Columbia	Richland	USA	Data processing, hosting & related services
Compass Group USA	Columbia	Richland	United Kingdom	Food services
Compass Group USA	Columbia	Richland	United Kingdom	Food services
Compass Group USA	Blythewood	Richland	United Kingdom	Food services
Compass Group USA	Columbia	Richland	United Kingdom	Food services
Compass Group USA	Eastover	Richland	United Kingdom	Food services
Computer Sciences Corp World Sourcing Services	Blythewood	Richland	USA	Supports IT needs of public sector, aerospace, & defense clients
Concept Unlimited Inc	Columbia	Richland		Sign Manufacturing
Dan Russ Screenprinting	Columbia	Richland		Commercial Screen Printing
Consolidated Systems Inc	Columbia	Richland		Sheet Metal Work Manufacturing
Constantia-Hueck Foils LLC	Blythewood	Richland	USA	Metal foil, packaging & labeling products
Continental American Insurance	Columbia	Richland	USA	Insurance
Coreslab Structures Inc	Hopkins	Richland	Canada	Concrete products
Coreslab Structures Inc	Hopkins	Richland	Canada	Concrete products

Company Name	City	County	Country	Product Description
Coreslab Structures Inc	Columbia	Richland	USA	Other Concrete Product Manufacturing
CorLogix	Columbia	Richland		Manufactures mobile computer carts for hospital & schools
Coveright	Blythewood	Richland	Germany	Surface materials for furniture, flooring, automotive & other applications
Cox and Dinkins, Inc	Columbia	Richland		Engineering firm
Craftsman Printing Co	Columbia	Richland	USA	Commercial Lithographic Printing
Crowson-Stone Printing Co Inc	Columbia	Richland		Other Commercial Printing
CSi Consolidated Systems Inc	Columbia	Richland		Headquarters, metal roofing & siding panels, bridge decking
CSLPlasma Services	Columbia	Richland	Australia	Plasma collection services
Cummins Atlantic	Columbia	Richland	USA	Distributor for Cummins
Curtis' Fabrication & Installation	Columbia	Richland		Sheet Metal Work Manufacturing
D-Energy	Columbia	Richland		Design & manufacture hydrogen generation systems that provide hydrogen gas to portable and stationary fuel cells
Dennis Corporation	Columbia	Richland		Engineering Firm
Deweys Service Co LLC	Columbia	Richland		Food Product Machinery Manufacturing
Diebold Inc	Columbia	Richland	USA	Sales & service of banking equipment
Lenscrafters Inc	Columbia	Richland	Italy	Optical goods stores
DMJM Harris - Columbia	Columbia	Richland		Engineering Firm
Document Systems Inc	Columbia	Richland		Information retrieval services
Doty Energy	Columbia	Richland		Research & production of alternative fuels
Doty Scientific Inc	Columbia	Richland		NMR & MRI coils & probes
Duck Creek Technologies	Columbia	Richland		Insurance solutions for property & casualty and healthcare
Duracraft Marine Corp	Columbia	Richland		Aluminum bass & pontoon boats
Dyer Riddle Mills & Precourt Inc (DRMP)	Columbia	Richland		Engineering Firm
Eagle Eye Analytics	Columbia	Richland		Analytic data services to insurance industry

Company Name	City	County	Country	Product Description
East Coast Steel Inc	Columbia	Richland	USA	Fabricated Structural Metal Manufacturing
Eastman Kodak Co	Columbia	Richland	USA	Photographic Film, Paper, Plate & Chemical Manufacturing
Elite Tool & Design Inc	Columbia	Richland		Machine Shop
EMC Corp	Columbia	Richland	USA	Computer Storage Device Manufacturing
Encyclopaedia Britannica Inc	Columbia	Richland	Luxembourg	Direct selling establishments
EnergySolutions LLC	Columbia	Richland	USA	Recycling & disposal of nuclear material
Engineering Design & Testing Corp.	Columbia	Richland		Engineering Firm
Exel Direct Inc	Columbia	Richland	Germany	Freight transportation
Ferguson Enterprises	Columbia	Richland	United Kingdom	Supplier of plumbing fixtures
Ferguson Enterprises	Columbia	Richland	United Kingdom	Supplier of plumbing fixtures
Ferguson Enterprises	Columbia	Richland	United Kingdom	Supplier of plumbing fixtures
Finnchem USA Inc	Eastover	Richland	Finland	Alkalies and chlorine
First Citizens Bancorporation, Inc	Columbia	Richland		Bank holding company
Flagship Sign Designs Inc	Columbia	Richland		Sign Manufacturing
FN Manufacturing LLC	Columbia	Richland	Belgium	Manufactures small arms & metal services
Foremost Insurance Co	Lexington	Richland	Switzerland	Insurance services
Form Tool Technology Inc	Elgin	Richland	USA	Cutting Tool & Machine Tool Accessory Manufacturing
Fresenius Medical Care	Columbia	Richland	Germany	Kidney dialysis center
Fresenius Medical Care	Columbia	Richland	Germany	Kidney dialysis center
Fresenius Medical Care	Columbia	Richland	Germany	Kidney dialysis center
Fresenius Medical Care	Columbia	Richland	Germany	Kidney dialysis center
Fresenius Medical Care	Columbia	Richland	Germany	Kidney dialysis center
Frischkorn Inc	Columbia	Richland	United Kingdom	Industrial pipe & fittings supplier
Fujitsu Transaction Solutions Inc	Blythewood	Richland	Japan	Computer design and consulting

Company Name	City	County	Country	Product Description
Garlock Helicoflex	Columbia	Richland	USA	Headquarters, high performance metal seals for aerospace, defense, high performance engines, racing, & other industries
Genesis Consulting Group, LLC	Columbia	Richland		Engineering Firm
Gira Steel Inc	Columbia	Richland		Fabricated Structural Metal Manufacturing
Golbus Associates Inc	Columbia	Richland		Polish & Other Sanitation Good Manufacturing
Guy White & Associates, inc.	Columbia	Richland		Engineering Firm
Humana Military Healthcare/TriCare	Columbia	Richland		Insurance
Hagemeyer North America Inc	Columbia	Richland	France	Distributor of electrical & industrial products
Hagemeyer North America Inc	Columbia	Richland	France	Distributor of electrical & industrial products
Hagemeyer North America Inc	Columbia	Richland	France	Distributor of electrical & industrial products
Haldex Brake Products Corp	Columbia	Richland	Sweden	Manufactures brake systems for heavy trucks
Hanson Brick East LLC	Columbia	Richland	Germany	Brick & Structural Clay Tile Manufacturing
Hardaway Concrete Co Inc	Columbia	Richland		Corporate Office, Ready-Mix Concrete Manufacturing
Hardaway Concrete Co Inc	Irmo	Richland		Ready-Mix Concrete Manufacturing
Hardaway Concrete Co Inc	Columbia	Richland		Ready-Mix Concrete Manufacturing
HCL America Inc	Columbia	Richland	India	Custom computer programming services
HealthPort	Columbia	Richland		Health information technology
Herald Office Supply Inc	Columbia	Richland	USA	Institutional Furniture Manufacturing
Hilti Inc	Columbia	Richland	Liechtenstein	Power-driven handtools
Hinson Cabinet Co Inc	Columbia	Richland		Wood Kitchen Cabinet & Countertop Manufacturing
Hitachi Data Systems Corp	Columbia	Richland	Japan	Computer storage systems
Household Finance Corp	Columbia	Richland	United Kingdom	Financial services
Household Finance Corp	Columbia	Richland	United Kingdom	Financial services

Company Name	City	County	Country	Product Description
House of Raeford Farms Inc	Columbia	Richland	USA	Poultry Processing
Howden North America Inc	Columbia	Richland	United Kingdom	Headquarters, sales & service of fans, blowers & compressors
HSMM	Columbia	Richland		Engineering Firm
Hubbell Power Systems	Columbia	Richland	USA	Headquarters of Hubbell Power Systems
Hunter Gatherer Brewery	Columbia	Richland		Microbrewery
Husqvarna Construction Products Inc	Columbia	Richland	Sweden	Saw blades
Hussey, Gay, Bell & DeYoung	Columbia	Richland		Engineering Firm
Hydro Conduit Corp	Columbia	Richland	Mexico	Concrete products
Hydrogen Hybrid Mobility (H2M)	Columbia	Richland		Integrated Hydrogen Fuel Cell Power for Personal Mobility Devices
ICI Paints	Columbia	Richland	Netherlands	Paint and wallpaper stores
ICI Paints	Columbia	Richland	Netherlands	Paint and wallpaper stores
IKON Office Solutions Inc	Columbia	Richland	Japan	Document management & printing services
Imagepoint Inc	Columbia	Richland	USA	Sign Manufacturing
Immedion LLC	Columbia	Richland		Enterprise-class dedicated data center provider
Integrated Business Systems & Services Inc	Columbia	Richland		Computer systems design services
Intel Columbia	Columbia	Richland	USA	Southeast R&D design center for enterprise & telecom servers
Intel Columbia St Andrews Model Shop	Columbia	Richland	USA	Southeast R&D design center for enterprise & telecom servers
International Paper Co	Eastover	Richland	USA	Fine paper
Intertape Polymer Group	Columbia	Richland	Canada	Paper packaging products
Jdj Enterprises Inc	Columbia	Richland		Commercial Lithographic Printing
Jefferson Homebuilders Inc	Columbia	Richland	USA	Wood Preservation
Jenny Craig Weight Loss Centers Inc	Columbia	Richland	Switzerland	Personal health services
Jordan Jones & Goulding Inc	Columbia	Richland		Engineering Firm
Joseph Walker & Co LLC	Columbia	Richland		Farm products distribution

Company Name	City	County	Country	Product Description
Kane Office Technologies Inc	Columbia	Richland		Quick Printing
Kevin Shull Racing (KSR)	Chapin	Richland		Hot rods & stock car manufacturing
Kli Enterprises Inc	Blythewood	Richland		All Other Miscellaneous Chemical Product & Preparation Manufacturing
Kontron	Columbia	Richland	Germany	Embedded computer technology systems
Koyo Corp of USA	Blythewood	Richland	Japan	Bearing hub assemblies
Kroger Co	Elgin	Richland	USA	Coffee & Tea Manufacturing
Kryotech IncChapin	Chapin	Richland		Instrument Manufacturing For Measuring & Testing Electricity & Electrical Signals
Laser Print Plus Inc	Columbia	Richland		Other Commercial Printing
Lenscrafters Inc	Columbia	Richland	Italy	Optical goods stores
Lenscrafters Inc	Columbia	Richland	Italy	Optical goods stores
Loomis US	Columbia	Richland	Sweden	Secure cash transport
Lindau Chemicals Inc	Columbia	Richland		All Other Basic Organic Chemical Manufacturing
Linde Gas North America	Columbia	Richland	Germany	Medical gas manufacturing
Loccioni	Columbia	Richland	Italy	Engineering services
LPA Group	Columbia	Richland	USA	Transportation engineering & consulting services
MACTEC, Inc.	Columbia	Richland		Engineering Firm
Marine Pro Inc	Irmo	Richland		Fiberglass boat repair
Mars Petcare Us Inc	Columbia	Richland	USA	Dog & Cat Food Manufacturing
Marwin Co Inc	Columbia	Richland		Other Millwork (Including Flooring)
Masterfoods USA Inc	Columbia	Richland	USA	Dog & cat food
Maximum Air Flow	Columbia	Richland		Fabricated Structural Metal Manufacturing
Mayer Circular Knitting Machinery Inc	Columbia	Richland	Germany	Service of circular knitting machines
Merritt Veterinary Supplies	Columbia	Richland		Headquarters, suppliers to licensed veterinarians

Company Name	City	County	Country	Product Description
Metal Equipment Fabricators of Columbia Inc	Columbia	Richland		Sheet Metal Work Manufacturing
Metal Supermarkets	Columbia	Richland		Steel Products
Metso Minerals Industries Inc	Columbia	Richland	Finland	Rock & minerals processing equipment
Micalline Products Inc	Columbia	Richland		All Other Plastics Product Manufacturing
Michael Craig & Co Inc	Columbia	Richland		Nonupholstered Wood Household Furniture Manufacturing
Michael Craig & Co Inc	Columbia	Richland	USA	Nonupholstered Wood Household Furniture Manufacturing
Mid-Carolina Steel Recycling	Columbia	Richland		Secondary Smelting, Refining & Alloying Of Nonferrous Metal (Except Copper & Aluminum)
Midland Manufacturing Co Inc	Columbia	Richland		Manufactures physical therapy equipment
Miles Engineering Associates LLC	Blythewood	Richland		Engineering Firm
Misys Healthcare Systems	Columbia	Richland	United Kingdom	Healthcare computer products
MMI Products Inc	Columbia	Richland	Ireland	Construction materials
Pepsi Bottling Group	Columbia	Richland		Soft Drinks
Monumental Life Insurance Co	Columbia	Richland	Netherlands	Life Insurance
Mulkey Inc	Columbia	Richland		Engineering Firm
News Group	Columbia	Richland	Canada	Distribution of magazines & newspapers
Nitek Inc	Irmo	Richland		High power electronics and visible LEDs & lasers
Northrop Grumman Information Technology	Columbia	Richland		Information technology services
Ometric Corp	Columbia	Richland		Computer based process control & product testing using spectroscopy
Ometric Corporation	Columbia	Richland		Real-time in-line optical spectroscopy
Owen Steel Co Inc	Columbia	Richland		Fabricates structural steel
Seibels Bruce Group Inc	Columbia	Richland		Insurance
Oxford Industries Inc	Columbia	Richland	USA	Women's & Girls' Cut & Sew Dress Manufacturing
Palmer Engineering	Columbia	Richland		Engineering Firm

Company Name	City	County	Country	Product Description
Palmetto Fuel Cell Technology	Columbia	Richland		Product and technology company serving fuel cell and hydrogen economy
Palmetto GBA	Columbia	Richland		Medicare health insurance
Palmetto Metal Products Inc	Columbia	Richland		Metal Window & Door Manufacturing
Palmetto State Armory	Columbia	Richland		Firearms & accessories
Parsons Brinckerhoff	Columbia	Richland	United Kingdom	Engineering Firm
Partition Systems Inc of South	Columbia	Richland		Showcase, Partition, Shelving & Locker Manufacturing
Patterson Dental Supply Inc	Columbia	Richland		Wholesale Medical/Hospital Equipment
Patterson Dental Supply Inc	Blythewood	Richland		Wholesale Dental Supplies
Special Care Medical Inc	Columbia	Richland		Wholesale Medical/Hospital Equipment
Patterson Fan Co Inc	Blythewood	Richland		Industrial & Commercial Fan & Blower Manufacturing
PBS&J	Columbia	Richland		Engineering Firm
Performance Ink Inc	Columbia	Richland		Laminated Plastics Plate, Sheet (Except Packaging) & Shape Manufacturing
PETNET Solutions Inc	Columbia	Richland	Germany	Diagnostic substances
Pilkington North America	Columbia	Richland	Japan	Automotive glass suppliers
Pinnacle Composites LLC	Columbia	Richland		Broadwoven Fabric Mills
Planned Administrators Inc	Columbia	Richland		Self funded health Insurance plans
PM&a	Columbia	Richland	USA	Urethane & Other Foam Product (Except Polystyrene) Manufacturing
Polaris Digital Systems Inc	Columbia	Richland		Electronic Computer Manufacturing
Posh Poochy Inc	Columbia	Richland		All Other Leather Good Manufacturing
Primesource Building Products Inc	Columbia	Richland	Japan	Supplier of building materials
Pure Fishing	Columbia	Richland	USA	Headquarters, fishing tackle
Pure Power Technologies LLC	Columbia	Richland	USA	Research & development, diesel fuel injectors
Pure Power Technologies LLC	Blythewood	Richland	USA	Diesel fuel injection components

Company Name	City	County	Country	Product Description
Quaker Chemical Co Inc	Columbia	Richland		Polish & Other Sanitation Good Manufacturing
Quality Electronics Inc	Columbia	Richland		Other Electronic Component Manufacturing
Quality Software Services Inc	Columbia	Richland	USA	Software development & design
Ram Automotive Co	Columbia	Richland		Automotive clutches
Randstad North America LP	Columbia	Richland	Netherlands	Employment agency
Randstad North America LP	Columbia	Richland	Netherlands	Employment agency
RBC Bank	Columbia	Richland	Canada	Commercial bank
Ready Mixed Concrete Co	Columbia	Richland	Colombia	Concrete manufacturing
Ready Mixed Concrete Co	Columbia	Richland	Colombia	Concrete manufacturing
Real Value Inc	Columbia	Richland		Wood Kitchen Cabinet & Countertop Manufacturing
REI Automation	Columbia	Richland		Factory automation & machinery design
Remote Tools Inc	Irmo	Richland		Engineering Firm
Rhythmink International LLC	Columbia	Richland		Designs, mfrs, & distributes neurodiagnostic & sleep accessories
Ricoh Americas Corp	Columbia	Richland	Japan	Office equipment
Riso Inc	Columbia	Richland	Japan	Supplier of color copiers
Ritedose Corp	Columbia	Richland	USA	Contract pharmaceutical manufacturing, esp blow-fill-seal
Rowell Steel Service Inc	Columbia	Richland		Fabricated Structural Metal Manufacturing
RR Donnelley & Sons Co	Columbia	Richland	USA	Commercial lithographic printing
SABIC Polymershapes Inc	Columbia	Richland	Netherlands	Wholesale plastic products
Safelite AutoGlass	Columbia	Richland	Belgium	Automotive glass replacement shop
SAIC Science Applications International Corp	Columbia	Richland		Engineering Firm
SCBT Financial Corporation	Columbia	Richland		Bank holding company
Schneider Electric	Columbia	Richland	France	Industrial controls
Scientific Games International	Blythewood	Richland	USA	Commercial Gravure Printing

Company Name	City	County	Country	Product Description
Seaco Inc	Columbia	Richland		Asphalt Paving Mixture & Block Manufacturing
Securitas Security Services USA Inc	Columbia	Richland	Sweden	Security and guard service
Securitas Security Services USA Inc	Columbia	Richland	Sweden	Security and guard service
Select Comfort	Irmo	Richland	USA	Mattress Manufacturing
Sensor Electronic Technology Inc	Columbia	Richland		Designs & manufactures semiconductor deep ultraviolet light devices
Service Printing Co Inc	Columbia	Richland		Other Commercial Printing
Shakespeare Co-Monofilament Div	Columbia	Richland	USA	Sporting & Athletic Goods
Sius Target Systems USA	Columbia	Richland	Switzerland	Sales & service of electronic targets and equipment
Sloan Construction Co Inc	Columbia	Richland	France	Highway and bridge construction
Sodexo Inc	Columbia	Richland	France	Food & facilities management services
Sodexo Inc	Columbia	Richland	France	Food & facilities management services
Sodexo Inc	Columbia	Richland	France	Food & facilities management services
Sodexo Inc	Columbia	Richland	France	Food & facilities management services
Solution Services Inc	Columbia	Richland		Machine Tool (Metal Cutting Types) Manufacturing
Sonus-USA Inc	Columbia	Richland	Italy	Hearing aid clinics
Southern Equipment Fabricators	Columbia	Richland		Sheet Metal Work Manufacturing
Southern Fabricators Inc	Columbia	Richland		Sheet Metal Work Manufacturing
Southern Sun Biosystems Inc	Hodges	Richland		Plant Propagation Technology
Southern Wine & Spirits of America	Columbia	Richland	USA	Wine and distilled alcoholic beverages
Southland Log Homes Inc	Irmo	Richland		Headquarters, custom designed log homes
Norco Equipment	Columbia	Richland		Forestry & bioenergy equipment
Southwinds Moulding Inc	Columbia	Richland		All Other Miscellaneous Manufacturing
Space Metal Fabricators Inc	Columbia	Richland		Machine Shop
Specialty Minerals Inc	Eastover	Richland	USA	All Other Basic Inorganic Chemical Manufacturing

Company Name	City	County	Country	Product Description
Spectrum Fabrication Inc	Columbia	Richland		Sheet Metal Work Manufacturing
Subway 30902 Cola 099	Columbia	Richland		Soft Drink Manufacturing
Spirax Sarco Inc	Blythewood	Richland	United Kingdom	Industrial valve manufacturing
Tiffany's Bakery & Eatery Inc	Columbia	Richland		Retail Bakeries
Staples Shared Services Center	Columbia	Richland	USA	Financial support functions
Stephryn Industries Inc	Columbia	Richland	USA	Corrugated & Solid Fiber Box Manufacturing
Stevens & Wilkinson of South Carolina Inc	Columbia	Richland		Engineering Firm
Stone International LLC	Columbia	Richland	USA	All Other Cut & Sew Apparel Manufacturing
StoneRiver Inc	Columbia	Richland		Insurance services
Strategic Resource Co	Columbia	Richland	USA	Administers group benefit products
Sunbelt Rentals	Columbia	Richland	United Kingdom	Equipment rental Co
Surgiform Technology Ltd	Columbia	Richland		Develops & manufactures surgical implants
Synfratech	Columbia	Richland		Seeking to manufacture biofuels, biofuels feedstock & feedstock farming equipment (photobioreactors)
Sysco	Columbia	Richland	USA	Food Distribution
TBE Group	Columbia	Richland		Engineering Firm
Thermal Engineering Corp	Columbia	Richland		Commercial & residential grills & industrial coating systems
Thomas & Howard Co.	Columbia	Richland		Food Distribution
ThyssenKrupp Elevator Corp	Columbia	Richland	Germany	Passenger transportation systems
Tire Kingdom Inc	Columbia	Richland	Japan	Tire retreading and repair shops
Tire Kingdom Inc	Columbia	Richland	Japan	Tire retreading and repair shops
Tire Kingdom Inc	Columbia	Richland	Japan	Tire retreading and repair shops
TM Floyd & Company (Companion Professional Svcs)	Columbia	Richland		IT Consulting Services
Trane US Inc	Blythewood	Richland	Ireland	Commercial air conditioning coils

Company Name	City	County	Country	Product Description
TRC Companies, Inc.	Columbia	Richland		Engineering Firm
TRC The Ritedose Corp	Columbia	Richland	USA	Packaging solutions for pharmaceutical industry
Trulite	Columbia	Richland	USA	Hydrogen fuel cell systems
Trumbull Services LLC	Columbia	Richland		Insurance software solutions
UBS	Columbia	Richland	Switzerland	Financial services
UCI Medical Affiliates Inc	Columbia	Richland		Business management consulting services
United American Election Supply	Blythewood	Richland		Election equipment & supplies
United States Aluminum & Steel	Columbia	Richland		Metal & plastic pipe & fittings
Unitrends	Columbia	Richland		Backup appliances for data protection & restoration
UTi Integrated Logistics	Columbia	Richland	British Virgin Islands	Supply chain services & logistics
VC3	Columbia	Richland		Information technology services, software provider
Velvetex Inc	Columbia	Richland		Commercial screen printing
Vendor's Supply Inc.	Columbia	Richland		Headquarters, distribution of vending machine food products
Verizon Wireless	Columbia	Richland	United Kingdom	Customer service call center
Vitro America Inc	Columbia	Richland	Mexico	Installer of auto replacement glass
Vulcan Materials Co	Columbia	Richland	USA	Manufactures concrete products
Wackenhut Corp	Columbia	Richland	United Kingdom	Security systems solutions
Water & Power Technologies Inc	Columbia	Richland	France	Water treatment plant equipment & solutions
Wells Fargo Bank	Columbia	Richland	USA	Customer service call center
Westar Aerospace & Defense Group Inc	Eastover	Richland	United Kingdom	Systems engineering for U.S. DOD & select commercial customers
Westinghouse Electric Co LLC	Columbia	Richland	Japan	Nuclear fuel assemblies
Westside Ice & Fuel Co of	Columbia	Richland		Ice Manufacturing
Wikoff Color Corp	Columbia	Richland	USA	Printing Ink Manufacturing
Wilbur Smith Associates	Columbia	Richland		Engineering firm; airport design & construction

Company Name	City	County	Country	Product Description
Williams Scotsman Inc	Irmo	Richland	United Kingdom	Supplier of mobile offices & modular buildings
Willis of South Carolina Inc	Columbia	Richland	Bermuda	Insurance agents and brokers
Woolpert, Inc.	Columbia	Richland		Engineering Firm
Zebra Pharmaceuticals	Columbia	Richland		Specialized pharmaceuticals & natural compounds

Source: SC Department of Commerce Records

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APPENDIX F: COUNTY DISTRESS REPORTS

Measuring Distress - A Tool for Economic Development

A fast simple way to calculate whether a county, region, or neighborhood may meet grant thresholds for unemployment and income. Just select county or tract and the tool will create regions or neighborhoods based on your choices.

1. The current geography is COUNTY. Click [TRACT](#) to change

2. Select geography with Map and/or the Dropdowns

Show dropdowns for: Counties Districts & Metros States

State: County:

Richland Co., South Carolina
 Newberry Co., South Carolina
 Lexington Co., South Carolina
 Fairfield Co., South Carolina

You may select
up to 255 counties

3. Year & Month

4. Get Report



You are in **NAVIGATE Mode (Move Map, Zoom)**
Click to switch to **SELECT Mode**

Distress Criteria Statistical Report

Reference Date: **12 / 2011 (All data elements refer to this date or earlier.)**

Region Consists of: Fairfield Co. SC, Lexington Co. SC, Newberry Co. SC, Richland Co. SC

Report Date: 3/15/2012 12:03:28 PM

Economic Distress Criteria—Primary Elements

	Region	U.S.	Threshold Calculations
24-month Average Unemployment Rate (BLS) period ending December 2011	8.97	9.29	-0.32
2010 Per Capita Money Income (3 year ACS)	\$25,289	\$26,942	93.86%
2009 Per Capita Money Income (5 year ACS)	\$25,267	\$27,041	93.44%
2009 Per Capita Personal Income (BEA)	\$35,363	\$39,635	89.22%
2000 Per Capita Money Income (Decennial Census)	\$20,372	\$21,587	94.37%

Economic Distress Criteria—Geographic Components

	24 Month Unemp	Threshold Calculation	ACS 3 Year PCMI	Threshold Calculation	BEA PCPI	Threshold Calculation	Census PCMI (2000)	Threshold Calculation	ACS 5 Year PCMI	Threshold Calculation
Fairfield County,	12.73	3.44	\$19,635	72.9	\$27,395	69.1	\$14,911	69.1	\$18,491	68.4

Measuring Distress - A Tool for Economic Development

A fast simple way to calculate whether a county, region, or neighborhood may meet grant thresholds for unemployment and income. Just select county or tract and the tool will create regions or neighborhoods based on your choices.

1. The current geography is COUNTY. Click [TRACT](#) to change

2. Select geography with Map and/or the Dropdowns

Show dropdowns for: Counties Districts & Metros States

State: County:

Fairfield Co., South Carolina

You may select up to 255 counties

3. Year & Month

4. Get Report



You are in **NAVIGATE Mode (Move Map, Zoom)**
Click to switch to **SELECT Mode**

Distress Criteria Statistical Report

Reference Date: **12 / 2011 (All data elements refer to this date or earlier.)**

Region Consists of: Fairfield Co. SC

Report Date: 3/15/2012 12:43:05 PM

Economic Distress Criteria—Primary Elements

	Region	U.S.	Threshold Calculations
24-month Average Unemployment Rate (BLS) period ending December 2011	12.73	9.29	3.44
2010 Per Capita Money Income (3 year ACS)	\$19,635	\$26,942	72.88%
2009 Per Capita Money Income (5 year ACS)	\$18,491	\$27,041	68.38%
2009 Per Capita Personal Income (BEA)	\$27,395	\$39,635	69.12%
2000 Per Capita Money Income (Decennial Census)	\$14,911	\$21,587	69.07%

Economic Distress Criteria—Geographic Components

	24 Month Unemp	Threshold Calculation	ACS 3 Year PCMI	Threshold Calculation	BEA PCPI	Threshold Calculation	Census PCMI (2000)	Threshold Calculation	ACS 5 Year PCMI	Threshold Calculation
Fairfield County,	12.73	3.44	\$19,635	72.9	\$27,395	69.1	\$14,911	69.1	\$18,491	68.4

Measuring Distress - A Tool for Economic Development

A fast simple way to calculate whether a county, region, or neighborhood may meet grant thresholds for unemployment and income. Just select county or tract and the tool will create regions or neighborhoods based on your choices.

1. The current geography is COUNTY. Click [TRACT](#) to change

2. Select geography with Map and/or the Dropdowns

Show dropdowns for: Counties Districts & Metros States

State: County:

Lexington Co., South Carolina

You may select up to 255 counties

3. Year & Month

4. Get Report



You are in **NAVIGATE Mode (Move Map, Zoom)**
Click to switch to **SELECT Mode**

Distress Criteria Statistical Report

Reference Date: **12 / 2011 (All data elements refer to this date or earlier.)**

Region Consists of: Lexington Co. SC

Report Date: 3/15/2012 12:44:53 PM

Economic Distress Criteria—Primary Elements

	Region	U.S.	Threshold Calculations
24-month Average Unemployment Rate (BLS) period ending December 2011	7.92	9.29	-1.37
2010 Per Capita Money Income (3 year ACS)	\$26,016	\$26,942	96.56%
2009 Per Capita Money Income (5 year ACS)	\$25,819	\$27,041	95.48%
2009 Per Capita Personal Income (BEA)	\$35,773	\$39,635	90.26%
2000 Per Capita Money Income (Decennial Census)	\$21,063	\$21,587	97.57%

Economic Distress Criteria—Geographic Components

	24 Month Unemp	Threshold Calculation	ACS 3 Year PCMI	Threshold Calculation	BEA PCPI	Threshold Calculation	Census PCMI (2000)	Threshold Calculation	ACS 5 Year PCMI	Threshold Calculation
Lexington County,	7.92	-1.37	\$26,016	96.6	\$35,773	90.3	\$21,063	97.6	\$25,819	95.5

Measuring Distress - A Tool for Economic Development

A fast simple way to calculate whether a county, region, or neighborhood may meet grant thresholds for unemployment and income. Just select county or tract and the tool will create regions or neighborhoods based on your choices.

1. The current geography is COUNTY. Click [TRACT](#) to change

2. Select geography with Map and/or the Dropdowns

Show dropdowns for: Counties Districts & Metros States

State: County:

Newberry Co., South Carolina

You may select up to 255 counties

3. Year & Month

4. Get Report



You are in **NAVIGATE Mode (Move Map, Zoom)**
Click to switch to **SELECT Mode**

Distress Criteria Statistical Report

Reference Date: **12 / 2011 (All data elements refer to this date or earlier.)**

Region Consists of: Newberry Co. SC

Report Date: 3/15/2012 12:45:28 PM

Economic Distress Criteria—Primary Elements

	Region	U.S.	Threshold Calculations
24-month Average Unemployment Rate (BLS) period ending December 2011	10.63	9.29	1.34
2010 Per Capita Money Income (3 year ACS)	\$22,009	\$26,942	81.69%
2009 Per Capita Money Income (5 year ACS)	\$20,237	\$27,041	74.84%
2009 Per Capita Personal Income (BEA)	\$28,447	\$39,635	71.77%
2000 Per Capita Money Income (Decennial Census)	\$16,045	\$21,587	74.33%

Economic Distress Criteria—Geographic Components

	24 Month Unemp	Threshold Calculation	ACS 3 Year PCMI	Threshold Calculation	BEA PCPI	Threshold Calculation	Census PCMI (2000)	Threshold Calculation	ACS 5 Year PCMI	Threshold Calculation
Newberry County,	10.63	1.34	\$22,009	81.7	\$28,447	71.8	\$16,045	74.3	\$20,237	74.8

Measuring Distress - A Tool for Economic Development

A fast simple way to calculate whether a county, region, or neighborhood may meet grant thresholds for unemployment and income. Just select county or tract and the tool will create regions or neighborhoods based on your choices.

1. The current geography is COUNTY. Click [TRACT](#) to change

2. Select geography with Map and/or the Dropdowns

Show dropdowns for: Counties Districts & Metros States

State: County:

Richland Co., South Carolina

You may select up to 255 counties

3. Year & Month

4. Get Report



You are in **NAVIGATE Mode (Move Map, Zoom)**
Click to switch to **SELECT Mode**

Distress Criteria Statistical Report

Reference Date: **12 / 2011 (All data elements refer to this date or earlier.)**

Region Consists of: Richland Co. SC

Report Date: 3/15/2012 12:45:58 PM

Economic Distress Criteria—Primary Elements

	Region	U.S.	Threshold Calculations
24-month Average Unemployment Rate (BLS) period ending December 2011	9.34	9.29	0.05
2010 Per Capita Money Income (3 year ACS)	\$25,475	\$26,942	94.55%
2009 Per Capita Money Income (5 year ACS)	\$25,865	\$27,041	95.65%
2009 Per Capita Personal Income (BEA)	\$36,302	\$39,635	91.59%
2000 Per Capita Money Income (Decennial Census)	\$20,794	\$21,587	96.33%

Economic Distress Criteria—Geographic Components

	24 Month Unemp	Threshold Calculation	ACS 3 Year PCMI	Threshold Calculation	BEA PCPI	Threshold Calculation	Census PCMI (2000)	Threshold Calculation	ACS 5 Year PCMI	Threshold Calculation
Richland County,	9.34	0.05	\$25,475	94.6	\$36,302	91.6	\$20,794	96.3	\$25,865	95.7

APPENDIX G: EDA ELIGIBILITY AND RATES

AREA ELIGIBILITY
(Excerpt from EDA regulations at 13 CFR § 301.2)

- (a) EDA awards Public Works and Development Facilities grants under 13 CFR Part 305 and Economic Adjustment grants under 13 CFR Part 308 for projects to enhance economic development in distressed areas.
- (b) An area is eligible for EDA investment assistance under 13 CFR Part 305 or 308 if it has one of the following:
1. An unemployment rate that is, for the most recent 24-month period for which data are available, at least one percent greater than the national average unemployment rate. For example, if the national average unemployment rate is 6 percent, an area is eligible under this provision if it has an unemployment rate of 7 percent.
 2. Per capita income that is, for the most recent period for which data are available, 80 percent or less of the national average per capita income.
 3. A special need, as determined by EDA, arising from actual or threatened severe unemployment or economic adjustment problems resulting from severe short-term or long-term changes in economic conditions, for example:
 - i. Substantial outmigration or population loss;
 - ii. Underemployment, that is, employment of workers at less than full time or at less skilled tasks than their training or abilities permit;
 - iii. Military base closures or realignments, defense contractor reductions-in-force, or Department of Energy defense-related funding reductions;
 - iv. Natural or other major disasters or emergencies;
 - v. Extraordinary depletion of natural resources;
 - vi. Closure or restructuring of industrial firms, essential to area economies; or
 - vii. Destructive impacts of foreign trade.
- (c) A non-distressed area [i.e., an area that does not meet the criteria of paragraph (b) above] within an Economic Development District is also eligible, provided the project will be of a substantial direct benefit to an area that meets at least one of the criteria of paragraph (b) above. A project provides substantial direct benefit if it provides significant employment opportunities for unemployed, underemployed or low income residents.
- (d) Normally an area is defined by geographical/political boundaries, e.g., city, county, Indian reservation. However, a smaller area (without regard to political boundaries) is also eligible even though it may be part of a larger community that overall is experiencing low distress. When the boundaries of the project area differ from established political boundaries, the project area must be of sufficient size appropriate to the proposed project, and the applicant must justify the proposed boundaries in relation to the project's benefits to the area.
- (e) Eligibility is determined at the time that EDA receives an application and is based on the most recent Federal data available for the area where the project will be located or where the substantial direct benefits will be received. If no Federal data are available to determine eligibility, an applicant must submit to EDA the most recent data available through the government of the State in which the area is located, i.e., conducted by or at the direction of the State government. Other data may be submitted, as appropriate, to substantiate eligibility based on special needs under paragraph (b)(3) above.
- (f) EDA may reject any documentation of eligibility that it determines is inaccurate.
- (g) There is no area eligibility requirement for assistance under 13 CFR Part 306 or 307.
- (h) EDA describes special need criteria under paragraph (b)(3) above in a Notice of Funding Availability (NOFA).

EDA GRANT RATES

EDA awards may not exceed 50 percent of project costs, except as determined by EDA in accordance with regulations at 13 CFR § 301.4. If your proposal includes a Federal grant rate that exceeds 50 percent of eligible project costs as shown in the preapplication or application budget, then you may be asked to justify the proposed reduction or waiver of the non-Federal share in accordance with EDA regulations on maximum Federal grant rates. Follow instructions below as they apply to your particular project.

1. **For Public Works and Economic Adjustment assistance (CFDA Nos. 11.300 and 11.307)**, see EDA regulations for maximum Federal grant rates provided at 13 CFR §301.4 and shown on the back of this form. Enter the provision and maximum grant rate that apply to this project below:

- • The project meets criteria at 13 CFR §301.4(b) subsection _____ for a maximum Federal grant rate of ___ percent.
- • Additional information to justify grant rate greater than 50 percent is attached (if requested by EDA).
- • Additional information to justify supplemental grant to other federal assistance program (13 CFR §301.4(e)) is attached.

2. **For projects located in designated Economic Development Districts**, additional EDA grant assistance not to exceed 10 percent of eligible project costs is requested as provided under 13 CFR §301.4(d):

- • Yes. Attach letter from the Economic Development District Director documenting that:
 - The project is located in a designated Economic Development District;
 - The applicant is actively participating in the economic development activities of the District;
 - The project is consistent with the strategy of the District; and
 - The District organization is not itself the sole project applicant.
- • No. Additional funding is not requested under this provision.

3. **For Planning and Technical Assistance (CFDA Nos. 11.302 and 11.303)**, attach a narrative to justify federal funding that exceeds 50 percent of eligible project costs. (See 13 CFR §301.4., 306.3(b), 307.7(c) or 307.3(c), as applicable.)

EDA GRANT RATES

Projects	Maximum Grant Rates (percentage)
(1) Projects of Indian tribes where EDA has made a determination to waive the non-Federal share of the cost of the project	100
(2) Projects under 13 CFR Part 308 located in Presidentially-declared disaster areas for which EDA invites an application for assistance under a supplemental appropriation, within 18 months of the date of declaration, and for which the President established a rate of Federal participation, based on the public assistance grant rate of the Federal Emergency Management Agency (FEMA) for the disaster, of greater than 80 percent	100
(3) Projects of Indian tribes where EDA has made a determination to reduce the non-Federal share of the cost of the project	less than 100
(4) Projects of States or political subdivisions of States that have exhausted their effective taxing and/or borrowing capacity, or nonprofit organizations that have exhausted their borrowing capacity	less than 100
(5) Projects under Part 308 located in Presidentially-declared disaster areas for which EDA receives an application for assistance under a supplemental appropriation, within 18 months of the date of declaration	80
(6) Projects located in Federally-declared disaster areas, for which EDA receives an application for assistance within 18 months of the date of declaration, when the Assistant Secretary determines that the applicant cannot provide the required non-Federal share because of the disaster's impact on the economic situation.	80
(7) Projects located in eligible areas where <ul style="list-style-type: none"> (i) The 24-month unemployment rate is at least 225% of the national average or (ii) The per capita income (PCI) is not more than 50% of the national average 	80
(8) Projects located in eligible areas that are not eligible for a higher rate, where <ul style="list-style-type: none"> (i) The 24-month unemployment rate is at least 180% of the national average or (ii) The PCI is not more than 60% of the national average 	70
(9) Projects located in eligible areas that are not eligible for a higher rate, where <ul style="list-style-type: none"> (i) The 24-month unemployment rate is at least 150% of the national average or (ii) The PCI is not more than 70% of the national average 	60
(10) Projects in all other eligible areas	50

Note: The table in 13 CFR §301.4(b) does not apply to projects which support the on-going operations of Economic Development Districts or University Centers. Grant rates for those projects are provided in 13 CFR Part 306 and Subpart B of 13 CFR Part 307, respectively.

APPENDIX H: HELPFUL EDA APPLICATION HINTS

Helpful Hints for Submitting a Strong Proposal to EDA

Understand EDA's Initial Project Analysis

The purpose of EDA's Initial Project Analysis is to undertake an initial review of the strength of the project, including its alignment with EDA's Investment Priorities. The evaluation does not encompass many other critical aspects of the application (legal, environmental, previous performance, distribution of projects, etc.) that will be considered in total by the Investment Review Committee (IRC). The outcome of the initial analysis is a recommendation to forward (or not forward) the project for consideration by the IRC.

Provide Supporting Evidence for Claims

Citing third-party evidence (such as federal/state data or an independent report) to support a claim will generally be reviewed more favorably. **EDA prefers that applicants provide data from federal or state sources, whenever possible; however, applicants may cite other quantitative or qualitative data, including** news articles, economic studies/market research, **and** letters of support from prospective partners and beneficiaries of the project. Where possible, **applicants should provide copies of supporting data as attachments, or provide a complete citation/source-reference for the supporting evidence in the project narrative.**

Make the ED-900 Application Form Work for You

Below are some helpful hints to ensure your ED-900 application highlights the fit between your project and EDA's evaluation criteria and provides EDA staff with the strongest possible evidence to support your claims. In general, the narrative responses to the questions in **Section A** of the ED-900 are the best forum for documenting how your project will match the goals and criteria outlined by the FFO. Other sections that can be effectively used to highlight a particular response to the criteria are highlighted below in **bold**.

Investment Priorities

Please note that the application needs to fully address only one of EDA's Investment Priorities to receive full credit.

Collaborative Regional Innovation:

Stakeholder Engagement. What other organizations are "actively involved" in the development and/or implementation of the project? Describe each organizational entity and its role in the project. Strong applications will draw from a broad range of partners in the project.

Development and Growth of Innovation Clusters. What are the region's major industry/occupational clusters? Use these to help document your region's unique economic assets. How will the proposed investment leverage these assets? How will the proposed investment expand or enhance the clusters you have identified?

Public-Private Partnerships:

What is the nature of any private sector engagement in the project? Have they provided letters of support, offered match contribution or been part of the leadership of this project? Does the project form part of a larger public initiative? If so, what is the nature/sources of other investments that are committed to the larger initiative? **Section B.5: Project Beneficiaries** is a good place to document this.

National Strategic Priorities:

Describe how the project will forward technology-led economic development in your region. EDA views projects with beneficiaries in the scientific, healthcare, cleantech or IT industries as competitive. Be sure to specify which industry the project supports by using a relevant NAICS code. These codes can be found at <http://www.naics.com/search.htm>.

Section B.5: Project Beneficiaries requests this information. Also, does the project provide access to capital for small and medium-sized and/or ethnically diverse enterprises? Does the project help build resiliency to future natural disasters? Does the project leverage urban water systems to promote economic revitalization? Does the project help a community reposition itself to respond to automotive industry restructuring?

Global Competitiveness:

How will the proposed investment help the region compete in the global marketplace? Does it target high-growth industries? Does it assist an industry with export potential? Will it support facilities or infrastructure to sustain or attract foreign direct investments?

Environmentally Sustainable Development:

Will the investment result in a green end-product, green an existing process or function, support a green place or utilize sustainable construction practices?

Economically Distressed and Underserved Communities

Does the project strengthen diverse communities that have suffered disproportionate economic and job losses and/or are rebuilding to become more competitive in the global economy? Support of this priority should be documented in **Section B.1 – B.3: Regional Eligibility**. When citing your data, please be sure to document the counties that make up the region you are describing and the year that was used to generate the data.

Job Creation/Retention and Private Investment Leveraged

Will the project result in credible, substantiated job creation/retention and private capital investment? Provide letters of support from beneficiaries of the project with job creation/retention numbers and/or supporting documentation provided by academic/third-party modeling. For non-construction projects, will the project's primary focus be on developing the regional capacity to support job and private investment creation? Document the beneficiaries that will create or save jobs, or commit to investing additional funds in the region, due to the proposed investment in section **B.5: Project Beneficiaries**.

Feasibility of the Project

Is the project practical, realistic, and does it possess the attributes to start quickly? Are all required resources to complete the project in place?

Sustainability/Durability of the Project

Is the project long-lasting and financially durable? Does the project have the financial resources to continue its day-to-day operations once the EDA grant is expended?

Organizational Capacity of the Project

Does the project leadership have experience managing similar projects? Is the applicant empowered to make key decisions? Has the applicant assembled the appropriate team to carry out the project? Has leadership built the support network necessary to assist the projects' implementation?

Alignment with Comprehensive Economic Development Strategy (CEDS)

Does the proposed project support the vital programs, projects, and activities identified in the region's Comprehensive Economic Development Strategy (CEDS) or other regional planning documents?