

CEDS Update 2013:
Building on a Strong Year



Anderson Cherokee Greenville Oconee Pickens Spartanburg

Annual Update of the Comprehensive Economic Development Strategy
for the Appalachian Region of South Carolina

Produced by:

The South Carolina Appalachian Council of Governments

Submitted to:

The U.S. Economic Development Administration – September 2013



Serving Six Counties and Forty-Two Municipalities since 1965

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Executive Summary

The following Comprehensive Economic Development Strategy Update:

- Is submitted to the U.S. Economic Development Administration (EDA) by the South Carolina Appalachian Council of Governments (SCACOG), which is the EDA *Economic Development District* for the Appalachian Region of South Carolina;
- Was prepared by SCACOG staff under the guidance of a special appointed CEDS Advisory Committee;
- Provides an updated economic profile for the region and each individual county;
- Identifies regional economic and workforce development challenges and opportunities based on interviews with local economic developers, workforce developers, and the private sector;
- Consults local, regional, and state economic and workforce plans and studies to gather valuable data and to ensure consistency of priorities between Region and State;
- Provides updates on the region's seven *Areas of Emphasis* for regional economic development: (1) Clusters, Target Industries and Innovation Capacities, (2) Workforce Development, (3) Infrastructure, (4) Available Sites and Buildings, (5) Entrepreneurship, (6) Access to Capital, and (7) Local Asset-Based Economic Development;
- Provides a strategic plan table for each area of emphasis, which includes *Goals, Objectives, Strategic Projects, Programs, and Activities*;
- Identifies *Vital Project* areas for on-going CEDS implementation and annual reporting;
- Is consistent with the SC Appalachian CEDS 2013-2017 *Plan of Action*, which:
 - Promotes economic development and opportunity;
 - Fosters effective transportation access;
 - Enhances and protects the environment;
 - Maximizes effective development and use of the workforce consistent with any applicable State or local workforce investment strategy;
 - Promotes the use of technology in economic development, including access to high-speed telecommunications;
 - Balances resources through sound management of physical development; and
 - Obtains and utilizes funds and other resources.

Section I: Introduction

Background and Purpose of the CEDS

The Comprehensive Economic Development Strategy (CEDS) is a program of the United States Department of Commerce *Economic Development Administration* (EDA). The Public Works and Economic Development Act of 1965 (PWEDA) requires federally designated “Economic Development Districts”, such as the South Carolina Appalachian Council of Governments (SCACOG), to develop and maintain a CEDS in order to (1) establish a regional economic development strategy, and (2) maintain the region’s eligibility for EDA grant competition and programs. The program requires annual updates of the CEDS as well as a full re-write of the CEDS at least every five years.

The following annual update demonstrates the progress made by the region over the past year in the execution of strategies called for in *CEDS 2013-2017: Building 21st Century Economic Development Capacity*. The update involved the work of committed individuals from both the private and public sector who desire to support the continued, positive growth of the SC Appalachian region. The region is made up of six counties and 42 municipalities (see table on the following page). As required by the CEDS program, this strategic plan “is designed to bring together the public and private sectors in the creation of an economic roadmap to diversify and strengthen the regional economy.”¹

About SCACOG

SCACOG is a voluntary organization of local governments in the Northwest corner of South Carolina, serving a region which includes the counties of Anderson, Cherokee, Greenville, Oconee, Pickens, and Spartanburg.

Since its formation in 1965, the Council has served the dual mission of tackling issues of regional significance and providing services to local governments. Economic and community development, transportation, infrastructure development, resource management, aging services, and workforce development are all issues of regional importance in which SCACOG takes an active role. At the local level, the agency’s services include general administration, technical assistance, training, planning, grant writing & administration, and information & mapping services.

¹ U.S. Department of Commerce *CEDS Summary Requirements*

Counties and Municipalities of the South Carolina Appalachian Council of Governments	
Anderson County	City of Anderson (County Seat) City of Belton Town of Honea Path Town of Iva Town of Pelzer Town of Pendleton Town of Starr Town of West Pelzer Town of Williamston
Cherokee County	Town of Blacksburg City of Gaffney (County Seat)
Greenville County	City of Fountain Inn City of Greenville (County Seat) City of Greer City of Mauldin City of Simpsonville City of Travelers Rest
Oconee County	Town of Salem City of Seneca City of Walhalla (County Seat) City of Westminster Town of West Union
Pickens County	Town of Central City of Clemson City of Easley City of Liberty Town of Norris City of Pickens (County Seat) Town of Six Mile
Spartanburg County	Town of Campobello Town of Central Pacolet City of Chesnee Town of Cowpens Town of Duncan City of Inman City of Landrum Town of Lyman Town of Pacolet Town of Reidville City of Spartanburg (County Seat) City of Wellford City of Woodruff

CEDS Update Methodology

The SCACOG Board of Directors serves as the federal *Economic Development District* for the region. This Board appointed a *CEDS Advisory Committee* who helped develop both the 5-year CEDS and this twelve-month update.

Throughout the collaborative planning process, a robust amount of information was gathered to update CEDS 2013-2017. This information included:

- The varied insights of individuals representing government and business;
- Face-to-face interviews with local economic and workforce developers in each county of the region in order to obtain ground level perspectives on challenges and opportunities;
- Findings from local, regional and state economic development plans and studies;
- GIS-based demographic data in order to reveal local and regional economic trends.

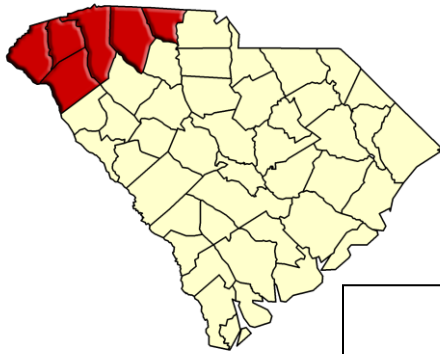
Upon completion, the updated CEDS was presented to the full SCACOG Board/EDD Organization for final critique and feedback. The document was also presented to each individual County Council at their monthly public meetings for additional input and recommendations. Upon completion of these steps, the SCACOG Board formally adopted CEDS 2013-2017 and recommended it for submission to the U.S. EDA.

The following tables display both the CEDS 2013-2017 Advisory Committee and the region's Economic Development District Organization:

CEDS Advisory Committee for the SC Appalachian Region		
Name	County	Area of Expertise
Francis Crowder	Anderson	Retired Manufacturing Executive
Rufus Foster, Jr.	Cherokee	Minority Business Owner
Don Godbey, Committee Chair	Greenville	Private Sector Professional Service Provider
Bob Winchester	Oconee	Sewer System Director
Larry Bagwell	Pickens	Mayor/Retired Educator
Mike Forrester	Spartanburg	State Rep and Post Secondary Education Economic and Workforce Development V.P.
Jennifer Miller	Region Wide	Private Sector Economic Development Organization

Regional Economic Development District Organization			
Name	County	General Purpose Elected Official	Membership Category
William O'Dell	Anderson	Yes	Elected Official
Eddie Moore	Anderson	Yes	Elected Official
Francis Crowder	Anderson	Yes	Elected Official
Mack Durham	Anderson	Yes	Elected Official
Terence Roberts	Anderson	Yes	Elected Official
Rick Laughridge	Anderson	Yes	Elected Official
Dennis Claramunt	Anderson	No	Private Sector
Ted Mattison	Anderson	No	Private Sector
Dennis Moss	Cherokee	Yes	Elected Official
Rufus Foster, Jr.	Cherokee	Yes	Elected Official
Henry Jolly	Cherokee	Yes	Elected Official
Ed Elliott	Cherokee	No	Private Sector
J. Frank Harris	Cherokee	No	Private Sector
Dan Rawls	Greenville	Yes	Elected Official
Butch Kirven	Greenville	Yes	Elected Official
Joe Dill	Greenville	Yes	Elected Official
Wayne McCall	Greenville	Yes	Elected Official
Lillian Brock Fleming	Greenville	Yes	Elected Official
Gaye Sprague	Greenville	Yes	Elected Official
Don Godbey	Greenville	No	Private Sector
Grady Butler	Greenville	No	Private Sector
Lottie Gibson	Greenville	No	Post Secondary Ed.
Thomas Alexander	Oconee	Yes	Elected Official
Reg Dexter	Oconee	Yes	Elected Official
Ernest Riley	Oconee	Yes	Elected Official
Bob Winchester	Oconee	No	Private Sector
Bennie Cunningham	Oconee	No	Private Sector
G. Neil Smith	Pickens	Yes	Elected Official
Jeff Martin	Pickens	Yes	Elected Official
Larry Bagwell	Pickens	Yes	Elected Official
Tom Hendricks	Pickens	No	Private Sector
Mike Forrester	Spartanburg	Yes	Elected Official
Dale Culbreth	Spartanburg	Yes	Elected Official
O'Neal Mintz	Spartanburg	Yes	Elected Official
Jane Hall	Spartanburg	Yes	Elected Official
Junie White	Spartanburg	Yes	Elected Official
Jan Scalisi	Spartanburg	Yes	Elected Official
Charles Morris, Jr.	Spartanburg	No	Private Sector
Elbert S. Tillerson, Sr.	Spartanburg	No	Private Sector
Loretta Smith	Spartanburg	No	Private Sector
Jennifer Miller, <i>Ex Officio</i>	Upstate Alliance	No	Private Sector

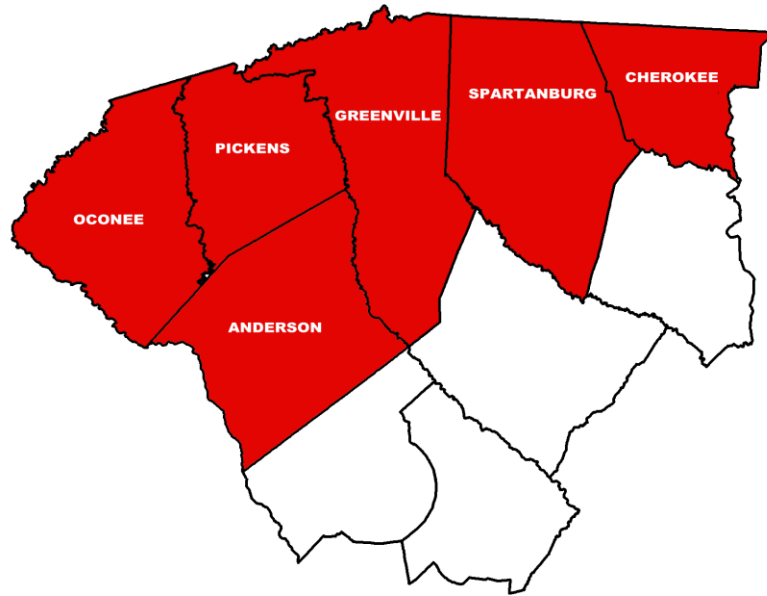
Section II: 2013 Regional Economic Profile



The Six County Region

Counties

- Anderson
- Cherokee
- Greenville
- Oconee
- Pickens
- Spartanburg



The historic development of the 6-county, 42-municipality *SC Appalachian Region* was largely based on agriculture until 1900, when textiles took over as the region’s most rapidly growing industry. For the past 25 years, the region’s economy has diversified tremendously, though technological advances have helped textiles to remain a significant presence. Catalytic investments from companies like *BMW*, which established its N. American HQ in Spartanburg County in 1992, and from *Michelin*, which named its Greenville County location as its North American HQ in 1988, have propelled regional economic development. Its location along the I-85 corridor, referred to by *Newsweek Magazine* as “The Boom Belt”, places the region directly between the largest business centers of the southeast: Atlanta and Charlotte. Its direct I-85 and I-26 access plus its proximity to major U.S. airports and seaports make the region attractive for regional, national and int’l firms.

24-Month Average Unemployment Rate, Period Ending June 2013	
U.S.	6 County Region
8.14%	8.28%
Source: BLS labor compiled from STATSAmerica.org	

Transportation Infrastructure	
Interstate Access	I-85, I-26, I-185, I-385, I-585
Nearest Commercial Airports	Greenville-Spartanburg Int’l
Nearest Civil Airports	Multiple
Port Access	Port of Charleston (approx. 200 miles); “The Inland Port” in Greer
Rail Providers	NSR, CSX, Carolina Piedmont

Population & Sales

SC Appalachian Region Total Population by Age as of 2012	
Metric	6 County Region
Total Population	1,193,986
Median Age	38.3 years
Age 14 & Under	19.4%
Age 15-19	6.9%
Age 20-54	46.4%
Age 55-64	12.8%
Age 65 & Up	14.3%

Source: U.S. Census Bureau, 2010. Census Population & Housing. ESRI Forecasts for 2012 & 2017.

Gross Retail Sales (millions)	
FY 2006-2007	\$31,354,065
FY 2007-2008	\$31,802,317
FY 2008-2009	\$30,132,413
FY 2009-2010	\$29,043,112
FY 2010-2011	\$31,435,880
FY 2011-2012	\$35,206,923

Source: SC Department of Revenue and Taxation

Workforce & Wages

Comparative Per Capita Income, 2012 & 2017 Projection		
	2012	2017
6 County Region	\$22,690	\$25,005
South Carolina	\$22,630	\$24,978
USA	\$26,409	\$29,882

Source: U.S. Census Bureau, Census 2010 Data. Esri forecasts for 2012 and 2017.

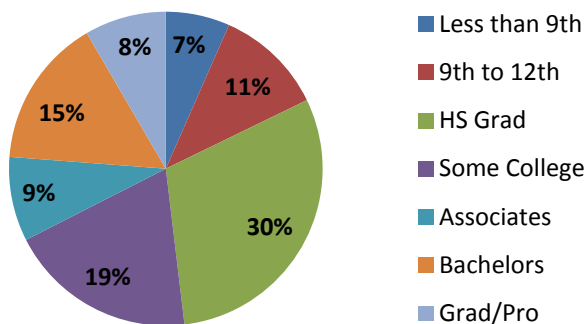
Where do people live and work?	
Live and work in Region	397,429
Commute into Region	93,359
Commute out of Region	78,517

Source: U.S. Census Bureau, 2010 Census. ESRI Market Profile Forecasts for 2012 & 2017. OnTheMap Application and LEHD Origin-Destination Employment Statistics.

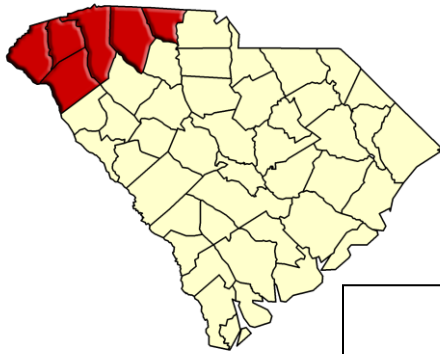
Regional Employment by Industry, as of 3 rd Qtr 2012			
Industry	Employees	%	Avg. Weekly Wage
All Private Industries	409,952	84.3%	\$755
Government	76,146	15.7%	\$860
Natural Resources & Mining	765	0.2%	\$578
Construction	18,927	3.9%	\$939
Manufacturing	82,287	16.9%	\$1,005
Trade, Transport., Utilities	102,059	21.0%	\$698
Information	8,175	1.7%	\$840
Financial Activities	19,175	3.9%	\$916
Professional & Business Services	70,388	14.5%	\$696
Education & Health Services	105,593	21.7%	\$817
Leisure & Hospitality	51,268	10.5%	\$285
Other Services	11,737	2.4%	\$529
Total (Private + Government)	486,098	---	\$838

Source: Quarterly Census of Employment and Wages (3rd Qtr 2012), SC Dept of Employment and Workforce.

Educational Attainment, Age 25+



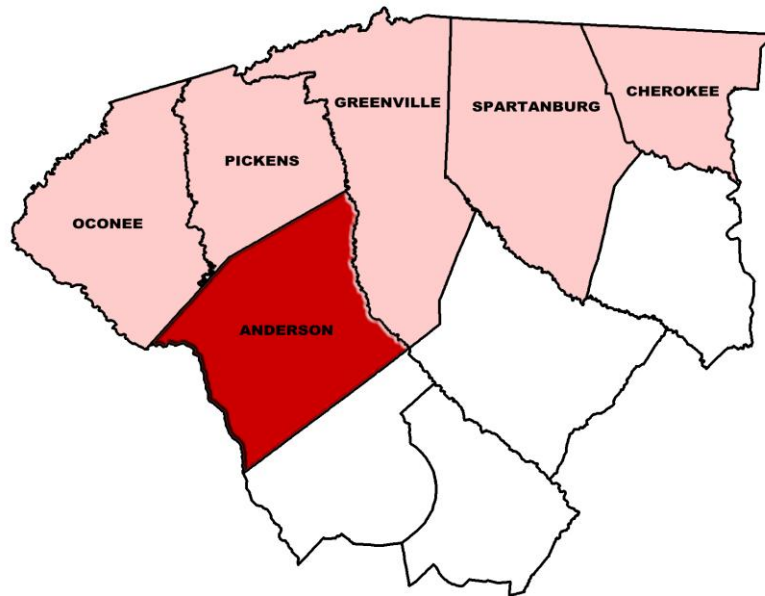
Source: American Community Survey, 2007-11 Averages, U.S. Census



Anderson County Economic Profile

Municipalities

- Anderson (Co. Seat)
- Belton
- Honea Path
- Iva
- Pelzer
- Pendleton
- Starr
- West Pelzer
- Williamston



Named for Revolutionary War leader Robert Anderson, the county has a growing industrial, commercial and tourist-based economy. Home to the 56,000 acre Lake Hartwell and its 1,000 miles of shoreline, Anderson County boasts not only natural beauty as a tourist destination, but also industrial strength and diversity. Major local industries include automotive, metal products, industrial machinery, plastics, and textiles. Anderson County is also home to Anderson University, a private and selective institution offering both undergrad and graduate degree programs. Nearby Tri-County Tech and Clemson University are also major assets for the local workforce. There are fun, historic, and revitalized downtown areas in Anderson County – including downtown Anderson and Pendleton. Anderson County is found along the 240-mile South Carolina National Heritage Corridor, which ends only a few hours away at the Atlantic Ocean.

24-Month Average Unemployment Rate, Period Ending June 2013

U.S.	6 County Region	Anderson County
8.14%	8.28%	8.61%

Source: BLS labor compiled from STATSAmerica.org

Transportation Infrastructure

Interstate Access	I-85 (direct connection)
Nearest Commercial Airports	Greenville-Spartanburg Int'l (40 minutes)
Nearest Civil Airports	Anderson Regional Airport
Port Access	Port of Charleston (217 miles); "The Inland Port" in Greer (40 minutes)
Rail Providers	CSX, Norfolk Southern, Pickens Railway

Population & Sales

Anderson County Total Population by Age as of 2012	
Metric	Anderson County
Total Population	189,685
Median Age	40.2 years
Age 14 & Under	19.7%
Age 15-19	6.4%
Age 20-54	44.7%
Age 55-64	22.7%
Age 65 & Up	15.7%

Source: U.S. Census Bureau, 2010. Census Population & Housing. ESRI Forecasts for 2012 & 2017.

Gross Retail Sales (millions)	
FY 2006-2007	\$4,420,095
FY 2007-2008	\$4,978,008
FY 2008-2009	\$4,386,917
FY 2009-2010	\$4,452,942
FY 2010-2011	\$5,035,547
FY 2011-2012	\$6,083,678

Source: SC Department of Revenue and Taxation

Workforce & Wages

Comparative Per Capita Income, 2012 & 2017 Projection		
	2012	2017
Anderson County	\$21,591	\$23,719
6 County Region	\$22,690	\$25,005
USA	\$26,409	\$29,882

Source: U.S. Census Bureau, Census 2010 Data. Esri forecasts for 2012 and 2017.

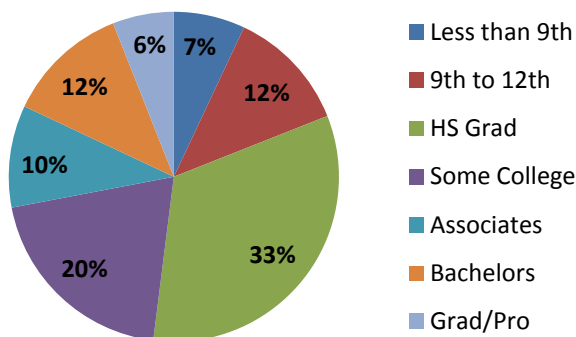
Where do people live and work?	
Live and work in Anderson Co.	34,191
Commute into Anderson Co.	24,737
Commute out of Anderson Co.	40,464

Source: U.S. Census Bureau, 2010 Census. ESRI Market Profile Forecasts for 2012 & 2017. OnTheMap Application and LEHD Origin-Destination Employment Statistics.

Anderson County Employment by Industry, as of 3 rd Qtr 2012			
Industry	Employees	%	Avg. Weekly Wage
All Private Industries	45,896	81.1%	\$611
Government	10,682	18.9%	\$807
Natural Resources & Mining	126	.2%	\$625
Construction	2,118	3.7%	\$721
Manufacturing	11,953	21.1%	\$874
Trade, Transport., Utilities	11,378	20.1%	\$550
Information	350	0.6%	\$857
Financial Activities	1,689	3.0%	\$674
Professional & Business Services	4,656	8.2%	\$497
Education & Health Services	5,495	9.7%	\$659
Leisure & Hospitality	6,773	12.0%	\$249
Other Services	13,058	2.4%	\$507
Total (Private + Government)	56,578	100%	\$618

Source: Data compiled by the Upstate SC Alliance: www.upstatescalliance.com. Quarterly Census of Employment and Wages (3rd Qtr 2012), SC Dept of Employment and Workforce.

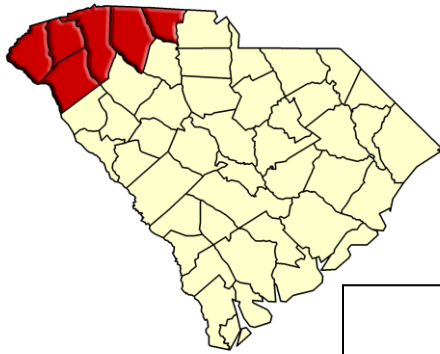
Educational Attainment, Age 25+



Source: American Community Survey, 2007-11 Averages, U.S. Census

County-Wide E.D. Websites

- County ED: www.advance2anderson.com
- County Chamber: www.andersonscchamber.com
- Innovate Anderson: www.innovateanderson.com
- Anderson CVB: www.visitanderson.com

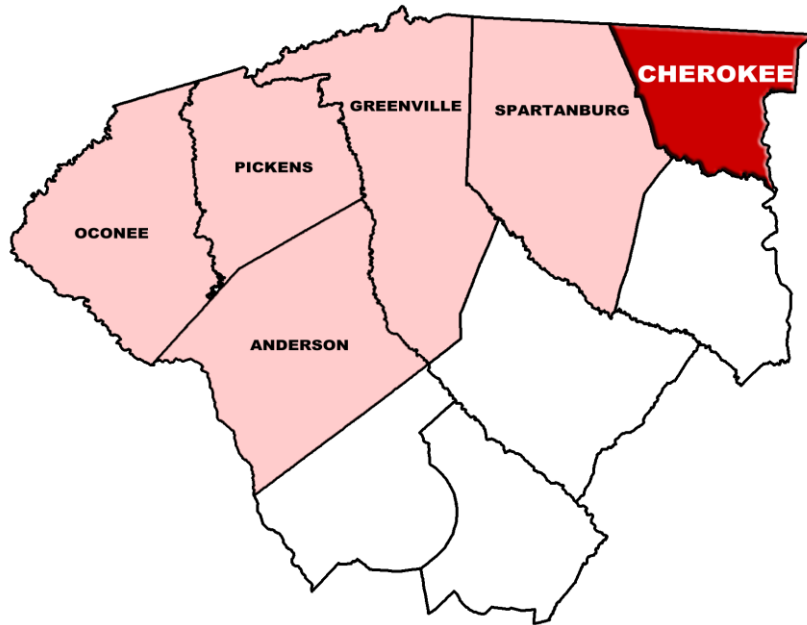


Cherokee County Economic Profile

Municipalities

Gaffney (County Seat)

Blacksburg



Named for its original Native American Cherokee population, the County was formed in 1897 with an economy based on iron ore and limestone. While the community grew around the textile industry during the 20th century, Cherokee County is now positioning itself for 21st century business. Strategically located along I-85 and between Greenville/Spartanburg (less than one hour south) and Charlotte (one hour north), the County benefits both from firms looking to minimize transport time along the I-85 “Boom Belt” and from travelers looking to stop and shop. The County is steeped in history, ranging from ancient Cherokee artifacts to two Revolutionary era battlefields – Cowpens and Kings Mountain. The County also has a rich agricultural tradition, particularly with peaches. Gaffney is home to the award-winning *South Carolina Peach Festival*, as well as a recently restored, historic U.S. Post Office now serving as the *Gaffney Visitors Center & Art Gallery*.

24-Month Average Unemployment Rate (BLS), Period Ending June 2013

U.S.	6 County Region	Cherokee County
8.14%	8.28%	11.87%

Source: STATSAmerica.org

Transportation Infrastructure

Interstate Access	I-85 (direct connection); I-26 (30 minutes)
Nearest Commercial Airports	Greenville-Spartanburg Int'l (40 minutes); Charlotte-Douglas Int'l (1 hr)
Nearest Civil Airports	Spartanburg Downtown Memorial (30 minutes); Shelby-Cleveland County Regional (30 minutes)
Port Access	Port of Charleston (206 miles); “The Inland Port” in Greer (30 minutes)
Rail Providers	Norfolk Southern

Population & Sales

Cherokee County Total Population by Age as of 2012	
Metric	Cherokee County
Total Population	56,033
Median Age	38.3 years
Age 14 & Under	20.2%
Age 15-19	6.9%
Age 20-54	45.6%
Age 55-64	13.3%
Age 65 & Up	14.1%

Source: U.S. Census Bureau, 2010. Census Population & Housing. ESRI Forecasts for 2012 & 2017.

Gross Retail Sales (millions)	
FY 2006-2007	\$1,142,921
FY 2007-2008	\$1,134,964
FY 2008-2009	\$1,118,482
FY 2009-2010	\$1,062,377
FY 2010-2011	\$1,198,106
FY 2011-2012	\$1,237,291

Source: U.S. Census Bureau, 2010 Census. ESRI Market Profile Forecasts for 2012 & 2017.

Workforce & Wages

Comparative Per Capita Income, 2012 & 2017 Projection		
	2012	2017
Cherokee County	\$17,412	\$18,701
6 County Region	\$22,690	\$25,005
USA	\$26,409	\$29,882

Source: U.S. Census Bureau, Census 2010 Data. Esri forecasts for 2012 and 2017.

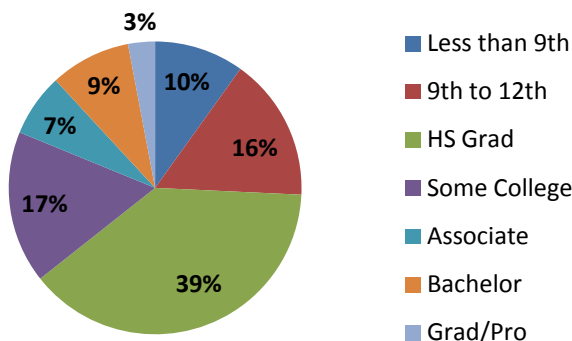
Where do people live and work?	
Live and work in Cherokee	10,027
Commute into Cherokee	5,538
Commute out of Cherokee	7,868

Source: U.S. Census Bureau, 2010 Census. ESRI Market Profile Forecasts for 2012 & 2017. OnTheMap Application and LEHD Origin-Destination Employment Statistics.

Cherokee County Employment by Industry, as of 3 rd Qtr 2012			
Industry	Employees	%	Avg. Weekly Wage
All Private Industries	15,733	89.3%	\$619
Government	1,878	10.7%	\$610
Natural Resources & Mining	211	1.2%	Not available
Construction	592	3.4%	\$804
Manufacturing	5,618	31.9%	\$800
Trade, Transport., Utilities	3,801	21.6%	\$550
Information	107	0.6%	\$589
Financial Activities	513	2.9%	\$717
Professional & Business Services	1,077	6.1%	\$504
Education & Health Services	1,865	10.6%	\$578
Leisure & Hospitality	1,686	9.6%	\$262
Other Services	273	1.6%	\$442
Total (Private + Government)	17,611	100%	\$618

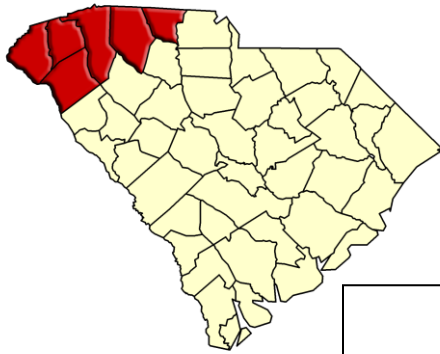
Source: Data compiled by the Upstate SC Alliance: www.upstatescalliance.com. Quarterly Census of Employment and Wages (3rd Qtr 2012), SC Dept of Employment and Workforce.

Educational Attainment, Age 25+



Source: American Community Survey, 2007-11 Averages, U.S. Census

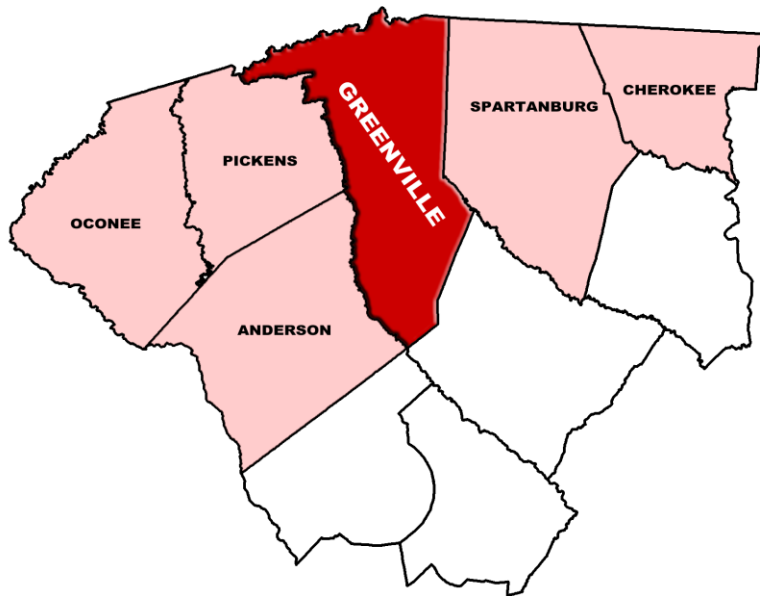
County Economic Development Agency
Cherokee County Development Board
www.cherokeeconomydevelopmentboard.com



Greenville County Economic Profile

Municipalities

- Fountain Inn
- Greenville (County Seat)
- Greer
- Mauldin
- Simpsonville
- Travelers Rest



Formed as the “Greenville District” in 1786, Greenville is the most populous County in South Carolina with a growth rate driven by successful economic development recruiting. Home to dozens of major international companies and corporate headquarters, Greenville County possesses an exciting blend of industrial strength, recreational amenities, and cultural venues. Downtown Greenville continues to receive national attention as a model for downtown development, while surrounding towns offer aesthetic appeal and southern charm. Paris Mountain State Park is a tremendous asset for outdoor enthusiasts, while the County possesses some of the best arenas and performing arts centers in the Southeast. Home to prestigious Furman University, Bob Jones University (with its world-renowned art collection), the Greenville Symphony Orchestra, and a variety of other cultural jewels, Greenville County is poised for continued economic vibrancy.

24-Month Average Unemployment Rate, Period Ending June 2013

U.S.	6 County Region	Greenville County
8.14%	8.28%	7.20%

Source: BLS labor compiled from STATSAmerica.org

Transportation Infrastructure

Interstate Access	I-85 (direct connection)
Nearest Commercial Airports	Greenville-Spartanburg Int'l
Nearest Civil Airports	Greenville Downtown Airport, SC Technology and Aviation Center
Port Access	Port of Charleston (212 miles); “The Inland Port” in Greer (local)
Rail Providers	CSX, Norfolk Southern, Greenville Piedmont

Population & Sales

Greenville County Total Population by Age as of 2012	
Metric	Greenville County
Total Population	464,394
Median Age	37.4 years
Age 14 & Under	20.1%
Age 15-19	6.5%
Age 20-54	47.9%
Age 55-64	12.3%
Age 65 & Up	13.3%

Source: U.S. Census Bureau, 2010. Census Population & Housing. ESRI Forecasts for 2012 & 2017.

Gross Retail Sales (millions)	
FY 2006-2007	\$14,547,546
FY 2007-2008	\$15,127,862
FY 2008-2009	\$13,764,523
FY 2009-2010	\$12,968,004
FY 2010-2011	\$13,466,994
FY 2011-2012	\$14,490,393

Source: SC Department of Revenue and Taxation

Workforce & Wages

Comparative Per Capita Income, 2012 & 2017 Projection		
	2012	2017
Greenville County	\$24,867	\$27,492
6 County Region	\$22,690	\$25,005
USA	\$26,409	\$29,882

Source: U.S. Census Bureau, Census 2010 Data. Esri forecasts for 2012 and 2017.

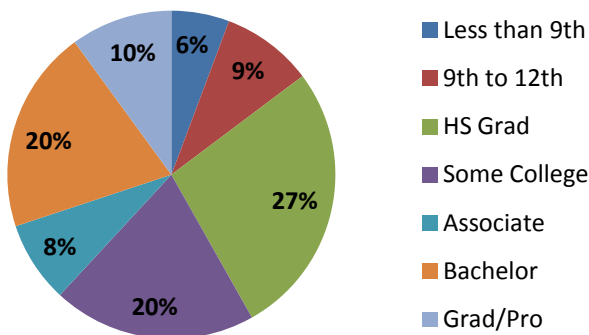
Where do people live and work?	
Live and work in Greenville Co.	126,847
Commute into Greenville Co.	65,165
Commute out of Greenville Co.	34,488

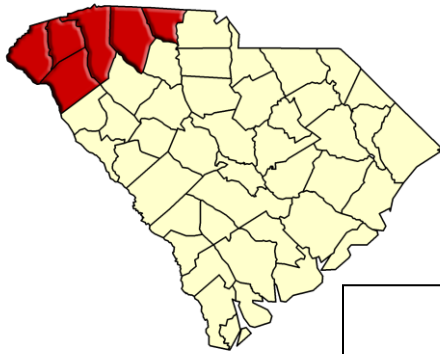
Source: U.S. Census Bureau, 2010 Census. ESRI Market Profile Forecasts for 2012 & 2017. OnTheMap Application and LEHD Origin-Destination Employment Statistics.

Greenville County Employment by Industry, as of 3 rd Qtr 2012			
Industry	Employees	%	Avg. Weekly Wage
All Private Industries	205,882	88.2%	\$797
Government	27,452	11.8%	\$861
Natural Resources & Mining	204	.1%	\$520
Construction	8,713	3.7%	\$856
Manufacturing	28,082	12.0%	\$1,053
Trade, Transport., Utilities	47,570	20.4%	\$726
Information	5,704	2.4%	\$979
Financial Activities	10,879	4.7%	\$1,023
Professional & Business Services	48,117	20.6%	\$867
Education & Health Services	25,692	11.0%	\$926
Leisure & Hospitality	24,891	10.7%	\$286
Other Services	6,030	2.6%	\$521
Total (Private + Government)	233,335	100%	\$805

Source: Data compiled by the Upstate SC Alliance: www.upstatescalliance.com. Quarterly Census of Employment and Wages (3rd Qtr 2012), SC Dept of Employment and Workforce.

Educational Attainment, Age 25+

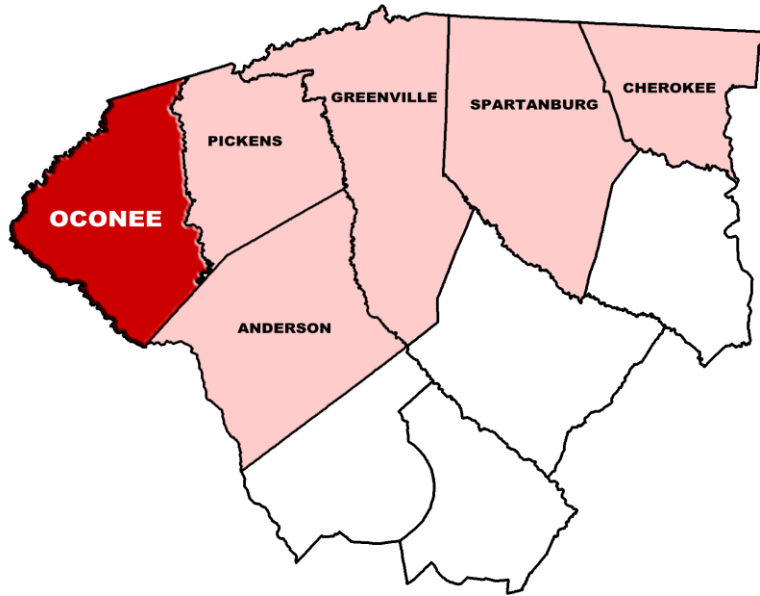




Oconee County Economic Profile

Municipalities

- Salem
- Seneca
- Walhalla (County Seat)
- Westminster
- West Union



Known as South Carolina’s “Golden Corner” and founded in 1868, Oconee County possesses an abundance of economic assets and natural resources. Numerous Fortune 500 companies call Oconee home and for good reason: its combination of highway access, qualified workforce, and aesthetic beauty make it a desirable destination for business and tourism. Duke Energy is a long-time major employer and has been an economic development partner for many years. The community is in the foothills of the Blue Ridge Mountains and possesses breathtaking forests, farms, lakes, rivers, and waterfalls. Lakes Hartwell, Jocassee, and Keowee are all in Oconee, along with the Chattooga National Wild & Scenic River – a national destination for white water rafting. The County’s inventory of available sites and buildings continues to grow, and an exciting new small business incubator has emerged in Walhalla – the *Tri-County Entrepreneurial Development Corporation*.

**24-Month Average Unemployment Rate,
Period Ending June 2013**

U.S.	6 County Region	Oconee County
8.14%	8.28%	9.21%

Source: BLS labor compiled from STATSAmerica.org

Transportation Infrastructure

Interstate Access	I-85 (direct connection)
Nearest Commercial Airports	Greenville-Spartanburg Int'l (1 hour)
Nearest Civil Airports	Clemson-Oconee Airport
Port Access	Port of Charleston (246 miles); “The Inland Port” in Greer (1 hour)
Rail Providers	Norfolk Southern

Population & Sales

Oconee County Total Population by Age as of 2012	
Metric	Oconee County
Total Population	75,277
Median Age	44 years
Age 14 & Under	17.1%
Age 15-19	6.1%
Age 20-54	41.8%
Age 55-64	15.3%
Age 65 & Up	19.7%

Source: U.S. Census Bureau, 2010. Census Population & Housing. ESRI Forecasts for 2012 & 2017.

Gross Retail Sales (millions)	
FY 2006-2007	\$1,202,482
FY 2007-2008	\$1,166,541
FY 2008-2009	\$1,048,396
FY 2009-2010	\$987,445
FY 2010-2011	\$1,066,392
FY 2011-2012	\$1,172,295

Source: SC Department of Revenue and Taxation

Workforce & Wages

Comparative Per Capita Income, 2012 & 2017 Projection		
	2012	2017
Oconee County	\$22,824	\$24,945
6 County Region	\$22,690	\$25,005
USA	\$26,409	\$29,882

Source: U.S. Census Bureau, Census 2010 Data. Esri forecasts for 2012 and 2017.

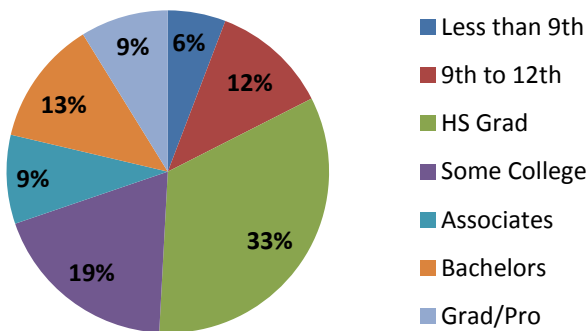
Where do people live and work?	
Live and work in Oconee Co.	13,043
Commute into Oconee Co.	5,264
Commute out of Oconee Co.	10,040

Source: U.S. Census Bureau, 2010 Census. ESRI Market Profile Forecasts for 2012 & 2017. OnTheMap Application and LEHD Origin-Destination Employment Statistics.

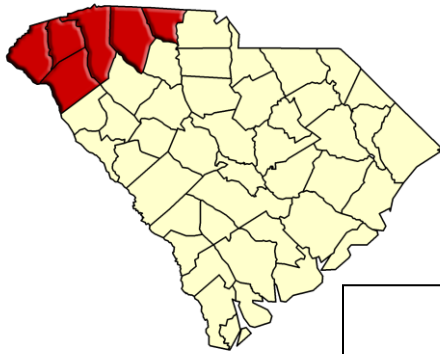
Oconee County Employment by Industry, as of 3 rd Qtr 2012			
Industry	Employees	%	Avg. Weekly Wage
All Private Industries	17,924	82.3%	\$776
Government	3,867	17.7%	\$661
Natural Resources & Mining	60	.3%	\$527
Construction	981	4.5%	\$680
Manufacturing	5,422	24.9%	\$974
Trade, Transport., Utilities	4,891	22.4%	\$875
Information	331	1.5%	\$690
Financial Activities	518	2.4%	\$713
Professional & Business Services	1,256	5.8%	\$677
Education & Health Services	1,641	7.5%	\$781
Leisure & Hospitality	2,148	9.9%	\$267
Other Services	676	3.1%	\$509
Total (Private + Government)	21,791	---	\$756

Source: Data compiled by the Upstate SC Alliance: www.upstatescalliance.com. Quarterly Census of Employment and Wages (3rd Qtr 2012), SC Dept of Employment and Workforce.

Educational Attainment, Age 25+



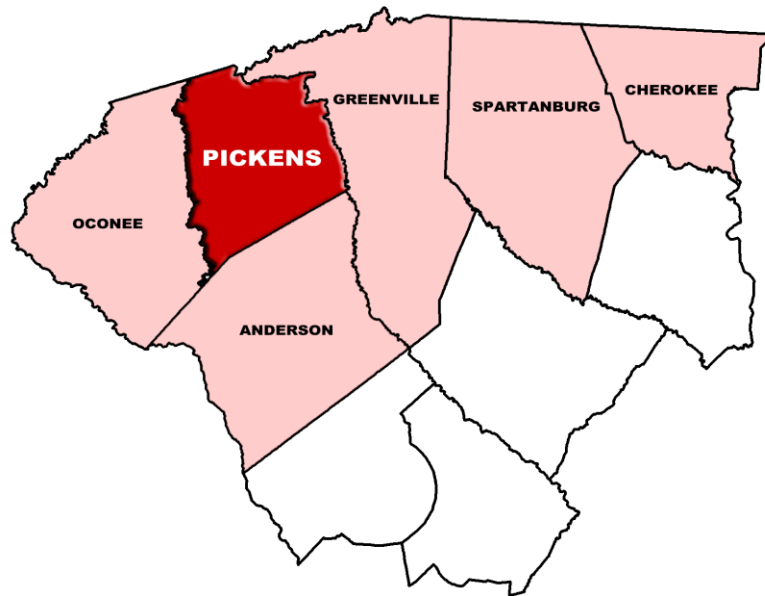
Source: American Community Survey, 2007-11 Averages, U.S. Census



Pickens County Economic Profile

Municipalities

- Central
- Clemson
- Easley
- Liberty
- Norris
- Pickens (County Seat)
- Six Mile



Steeped in Revolutionary era history and adorned with mountains and lakes, Pickens County offers both economic vitality and a high quality of life. Nationally reputed Clemson University is an irreplaceable presence in the community, as innovations spun out of that *Top 25 Public Research Institution* help drive several of the region’s industrial clusters – including *Advanced Materials* and *Automotive*. Boasting one of the best County School systems in South Carolina, local Daniel High School was recently named by *U.S. News and World Report* as the #1 Traditional High School in the state. The acclaimed *Pickens County Career and Technical Center* (a consolidated tech program of the four County high schools) and Tri-County Technical College are preparing students for 21st century manufacturing jobs. Its strong industrial base, workforce development emphasis, and tourism assets position Pickens County for continued economic development success.

24-Month Average Unemployment Rate, Period Ending June 2013

U.S.	6 County Region	Pickens County
8.14%	8.28%	8.08%

Source: BLS labor compiled from STATSAmerica.org

Transportation Infrastructure

Interstate Access	I-85
Nearest Commercial Airports	Greenville-Spartanburg Int'l (45 minutes)
Nearest Civil Airports	Pickens County Airport, Clemson-Oconee Airport
Port Access	Port of Charleston (231 miles); "The Inland Port" in Greer (45 minutes)
Rail Providers	Norfolk Southern, CSX

Population & Sales

Pickens County Total Population by Age as of 2012	
Metric	Pickens County
Total Population	120,551
Median Age	35.1 years
Age 14 & Under	16.6%
Age 15-19	9.3%
Age 20-54	48.1%
Age 55-64	12.0%
Age 65 & Up	13.9%

Source: U.S. Census Bureau, 2010. Census Population & Housing. ESRI Forecasts for 2012 & 2017.

Gross Retail Sales (millions)	
FY 2006-2007	\$1,939,923
FY 2007-2008	\$1,929,843
FY 2008-2009	\$1,850,954
FY 2009-2010	\$1,736,564
FY 2010-2011	\$1,968,115
FY 2011-2012	\$1,918,390

Source: SC Department of Revenue and Taxation

Workforce & Wages

Comparative Per Capita Income, 2012 & 2017 Projection		
	2012	2017
Pickens County	\$20,783	\$22,917
6 County Region	\$22,690	\$25,005
USA	\$26,409	\$29,882

Source: U.S. Census Bureau, Census 2010 Data. Esri forecasts for 2012 and 2017.

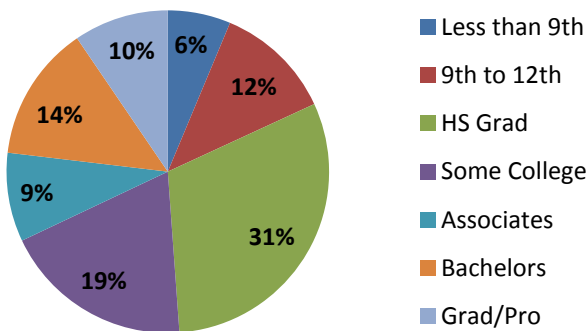
Where do people live and work?	
Live and work in Pickens Co.	16,577
Commute into Pickens Co.	14,013
Commute out of Pickens Co.	23,435

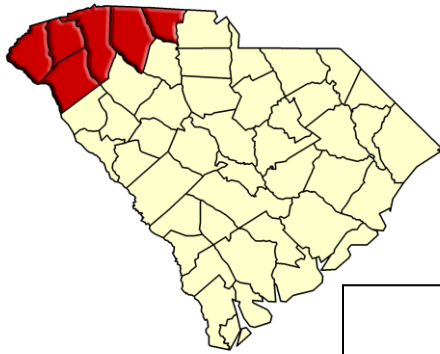
Source: U.S. Census Bureau, 2010 Census. ESRI Market Profile Forecasts for 2012 & 2017. OnTheMap Application and LEHD Origin-Destination Employment Statistics.

Pickens County Employment by Industry, as of 3 rd Qtr 2012			
Industry	Employees	%	Avg. Weekly Wage
All Private Industries	24,725	75.6%	\$584
Government	7,984	24.4%	\$1,015
Natural Resources & Mining	102	.3%	\$530
Construction	1,197	3.7%	\$611
Manufacturing	5,468	16.7%	\$799
Trade, Transport., Utilities	5,133	15.7%	\$548
Information	343	1.0%	\$1,178
Financial Activities	1,094	3.3%	\$915
Professional & Business Services	2,280	7.0%	\$511
Education & Health Services	3,676	11.2%	\$674
Leisure & Hospitality	4,654	14.2%	\$238
Other Services	779	2.4%	\$409
Total (Private + Government)	32,710	---	\$689

Source: Data compiled by the Upstate SC Alliance: www.upstatescalliance.com. Quarterly Census of Employment and Wages (3rd Qtr 2012), SC Dept of Employment and Workforce.

Educational Attainment, Age 25+

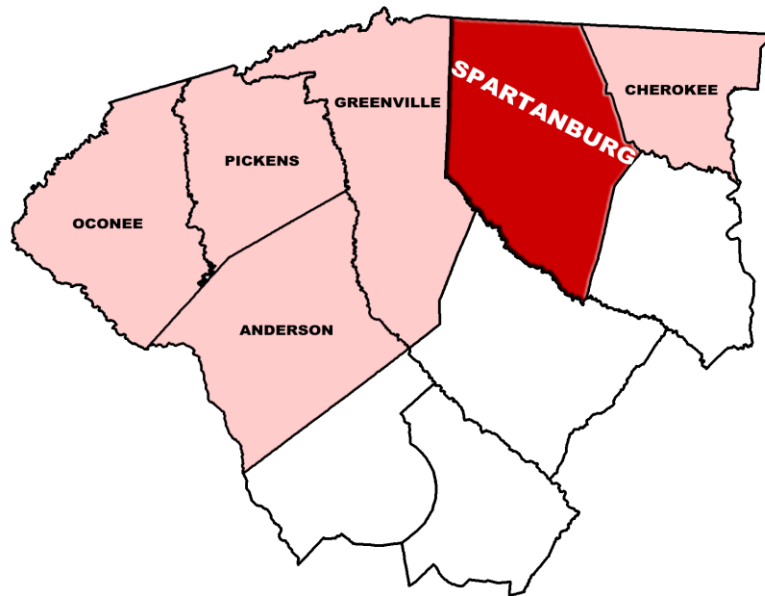




Spartanburg County Economic Profile

Municipalities

Campobello
 Central Pacolet
 Chesnee
 Cowpens
 Duncan
 Inman
 Landrum
 Lyman
 Pacolet
 Reidville
 Spartanburg (County Seat)
 Wellford
 Woodruff



Spartanburg County was formed in 1785 and named after a local Revolutionary War militia called “The Spartan Regiment”. Originally a frontier trading post, its economy progressed over the centuries into a major textile and international business center. Home to BMW’s North American Headquarters, Spartanburg County boasts within its borders more than 100 international companies from 15 different countries. The *New York Times* recently cited that Spartanburg County had the highest per capita international investment in the country. Key to this success is the County’s location at the crossroads of I-26 and I-85, the presence of the growing Greenville-Spartanburg International Airport, and the Port of Charleston—which is only three hours away. Spartanburg County also possesses a wealth of artistic, cultural, and sporting venues as well as several public and private colleges—all of which energize the local economy.

24-Month Average Unemployment Rate, Period Ending June 2013

U.S.	6 County Region	Spartanburg County
8.14%	8.28%	9.09%

Source: BLS labor compiled from STATSAmerica.org

Transportation Infrastructure

Interstate Access	I-85, I-26
Nearest Commercial Airports	Greenville-Spartanburg Int’l
Nearest Civil Airports	Spartanburg Downtown Memorial Airport
Port Access	Port of Charleston (204 miles); “The Inland Port” in Greer
Rail Providers	Norfolk Southern, CSX

Population & Sales

Spartanburg County Total Population by Age as of 2012	
Metric	Spartanburg County
Total Population	288,046
Median Age	38.3 years
Age 14 & Under	19.9%
Age 15-19	7.1%
Age 20-54	46.1%
Age 55-64	12.9%
Age 65 & Up	14.0%

Source: U.S. Census Bureau, 2010. Census Population & Housing. ESRI Forecasts for 2012 & 2017.

Gross Retail Sales (millions)	
FY 2006-2007	\$8,101,098
FY 2007-2008	\$7,465,099
FY 2008-2009	\$7,963,141
FY 2009-2010	\$7,835,780
FY 2010-2011	\$8,700,726
FY 2011-2012	\$10,304,876

Source: SC Department of Revenue and Taxation

Workforce & Wages

Comparative Per Capita Income, 2012 & 2017 Projection		
	2012	2017
Spartanburg County	\$21,695	\$23,758
6 County Region	\$22,690	\$25,005
USA	\$26,409	\$29,882

Source: U.S. Census Bureau, Census 2010 Data. Esri forecasts for 2012 and 2017.

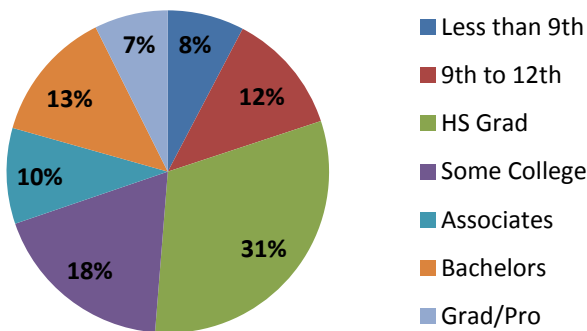
Where do people live and work?	
Live and work in Spartanburg Co.	65,430
Commute into Spartanburg Co.	28,082
Commute out of Spartanburg Co.	30,685

Source: U.S. Census Bureau, 2010 Census. ESRI Market Profile Forecasts for 2012 & 2017. OnTheMap Application and LEHD Origin-Destination Employment Statistics.

Spartanburg County Employment by Industry, as of 3 rd Qtr 2012			
Industry	Employees	%	Avg. Weekly Wage
All Private Industries	95,067	84.6%	\$747
Government	17,245	15.4%	\$874
Natural Resources & Mining	263	.2%	\$692
Construction	5,274	4.7%	\$832
Manufacturing	25,002	22.3%	\$973
Trade, Transport., Utilities	23,551	21.0%	\$548
Information	738	.7%	\$818
Financial Activities	4,030	3.6%	\$866
Professional & Business Services	12,181	10.8%	\$808
Education & Health Services	10,169	9.1%	\$800
Leisure & Hospitality	11,310	10.1%	\$303
Other Services	2,549	2.3%	\$554
Total (Private + Government)	112,312	---	\$766

Source: Data compiled by the Upstate SC Alliance: www.upstatescalliance.com. Quarterly Census of Employment and Wages (3rd Qtr 2012), SC Dept of Employment and Workforce.

Educational Attainment, Age 25+



Source: American Community Survey, 2007-11 Averages, U.S. Census

Section III: Strategic Projects, Programs, and Activities

Clusters, Target Industries and Innovation Capacities

The following strategic plan is outlined in CEDS 2013-2017.

<u>CEDS 2013-2017 Strategic Plan</u>	
Goals:	<ul style="list-style-type: none"> • Promote the growing regional industrial clusters and target industries of Advanced Materials, Automotive, Biosciences, Energy, and Aerospace. • Promote local clusters and target industries which are unique to individual counties and communities.
Supportive Findings	<ul style="list-style-type: none"> • Objective, scientific cluster analysis has revealed five growing, technologically promising industry clusters in the region: Advanced Materials, Automotive, Biosciences, Energy and Aerospace. • The Upstate Alliance is marketing these clusters as target industries for the region on a global level. • There are outstanding regional foundations of innovation capacity and institutional partners for each cluster/target industry. • In addition to the five region-wide clusters, individual counties have also analyzed their unique assets in order to form their own additional industry targets.
Objectives	<ol style="list-style-type: none"> 1. Provide capacity-building technical assistance for the recruitment and enhancement of the region's Advanced Materials industrial cluster. 2. Provide capacity-building technical assistance for the recruitment and enhancement of the region's Automotive industrial cluster. 3. Provide capacity-building technical assistance for the recruitment and enhancement of the region's Biosciences industrial cluster. 4. Provide capacity-building technical assistance for the recruitment and enhancement of the region's Energy industrial cluster. 5. Provide capacity-building technical assistance for the recruitment and enhancement of the region's Aerospace industrial cluster. 6. Provide technical assistance to capacity-building and recruitment efforts for local target industries which are supported by a community's own unique assets. The Anderson County target industry of Data Centers is an example; the community has a unique set of local assets which make this industry a logical recruiting target.
Strategic Projects, Programs, and Activities	<p>For Objectives 1-6:</p> <ul style="list-style-type: none"> • Provide GIS-based research, map making and location decision analysis for communities, universities, industries and other related partners to further strengthen regional cluster-based economic development; • Provide strategic economic development planning and grant-writing services to further expand the capacity of all regional clusters and target industries.
Strategic Partners:	<p>SCACOG; all County and City local economic developers throughout the region; the Upstate Alliance; the South Carolina Department of Commerce; the Appalachian Development Corporation. Note: please see the <i>Regional Innovation Capacity</i> tables in this chapter for the numerous institutional partners related to each individual regional cluster.</p>
Time Line:	<p>2013-2017</p>

The past twelve months have been an exciting time for *Clusters, Target Industries, and Innovation Capacities* in the SC Appalachian Region. As noted above in the Strategic Plan for this *CEDS Area of Emphasis*, the five regional target industries are *Advanced Materials, Aerospace, Automotive, Biosciences, and Energy*—plus community-specific target industries based on existing local assets, such as the *Data Centers* target in Anderson County. The table below displays outstanding capital investment and job creation figures in these areas over the past twelve months.

Performance of Target Industries/Clusters in SC Appalachian Region, 09-2012 to 08-2013						
New Company Announcements						
	Advanced Materials	Aerospace²	Automotive	Biosciences	Energy	Other Industries
Companies	5	---	7	1	3	7
Investment	\$25,250,000	---	\$38,000,000	14,000,000	\$2,000,000	\$29,650,000
New Jobs	137	---	521	100	82	286
Existing Company Expansions						
	Advanced Materials	Aerospace	Automotive	Biosciences	Energy	Other Industries
Expansions	9	1	4	1	2	5
Investment	\$263,450,000	---	\$59,500,000	---	\$7,000,000	207,750,000
New Jobs	446	20	175	80	---	220
Total Accomplishments (New + Existing Companies)						
	Advanced Materials	Aerospace	Automotive	Biosciences	Energy	Other Industries
Companies	14	1	11	2	5	12
Total \$	\$288,700,000	---	\$97,500,000	\$14,000,000	\$9,000,000	237,400,000
Total Jobs	583	20	696	180	82	506
<u>Totals</u> 45 companies \$646,600,000 Investment 2,067 Jobs						

Source: The Upstate South Carolina Alliance (<http://www.upstatescalliance.com>)

Key to carrying on this successful rate of investment and job creation is to work with federal partners and to continue building upon the public-private *innovation capacities* outlined in Section III of CEDS

² While Calendar Year 2012 saw approximately \$8 million investment and 100 new jobs in the *Aerospace* target industry, pending projects over the past 12 months have not yet been announced as of 08/2013.

2013-2017. While an inventory of these innovation engines is detailed in the 5-year CEDS, this *Update* includes some notable projects over the past year that have increased capacity:

Regional Innovation Capacities Getting Stronger
The Clemson University – International Center for Automotive Research (CU-ICAR) is expanding through construction of the new Research One building which will bring a combination of specialized classroom and incubation space for automotive start-up companies.
The local South Carolina Technology and Aviation Center (SCTAC) has partnered with the CU-ICAR to develop a program to test wireless charging systems in electric vehicles . SCTAC and CU-ICAR have contracted with Oak Ridge National Laboratory to support this three year cutting edge automotive program, and the research is funded by the U.S. Department of Energy.
The Clemson University Advanced Materials Research Laboratory continues to strengthen its innovation capacity in this target industry. Inside the 111,000 square foot facility are some of the world’s brightest researchers and most state-of-the-art equipment. The National Science Foundation, the Department of Defense, and NASA have all recognized the laboratory’s impact.
Clemson University, in conjunction with the Greenwood Genetic Center, will expand existing facilities of the J.C. Self Research Institute to add a 17,000-square-foot research and education center in human genetics on nearly 15 acres donated by Greenwood County. While Greenwood is adjacent to the Six-County SC Appalachian Region, the impact of this biosciences facility has a significant impact on the region.
The U.S. Energy Department is working with Clemson University to develop courses and training programs that will help researchers and students gain a better understanding of technology being developed to monitor the electric grid.
A recent study released by the Association for Unmanned Vehicle Systems International conducted a study stating that region is poised for growth in the aerospace industry – claiming that more than 500 jobs could be created over the next few years.

Note: Table is a set of examples and not intended to be a comprehensive list of every innovation development.

In keeping with CEDS 2013-2017, the regional Economic Development District will continue to work with local, regional, state, and federal partners to continue strengthening these vital project areas of innovation and cluster-based development.

Infrastructure

The following strategic plan for infrastructure is outlined in CEDS 2013-2017:

CEDS 2013-2017 Strategic Plan	
Goal: Make the SCACOG region attractive for economic development by sustaining and enhancing physical infrastructure.	
Supportive Findings	
<ul style="list-style-type: none"> • With 225 miles of interstate highway along I-85 and I-26, the region has a great foundation for transportation infrastructure. These interstates provide fast access to surrounding regions and to world class airports and seaports. • Road and highway networks must continue to be upgraded in order alleviate congestion and to foster successful development in a growing region. • Communities face great capital challenges for extending and upgrading their water and sewer services in order to facilitate new investment and job creation. • Power, Natural Gas and Telecommunications play an increasingly important role in the region and must continue to be supported. • While several major regional employers rely on rail service, there is potential to connect more sites to rail in order to attract major economic development prospects. The new, centrally located “Inland Port” rail terminal will have a transformational impact on the region’s rail capacity and relieve highway truck traffic through increased intermodal product transport. 	
Objectives	
<ol style="list-style-type: none"> 1. Promote effective transportation and land use planning throughout the region. 2. Support improving and increasing the economic development capacity of Greenville Spartanburg International Airport and all other regional airports. 3. Support increasing the capacity of the Port of Charleston, which is a great asset for international business development in the region. 4. Support increasing the capacity and connectivity of regional water, sewer, rail, power, natural gas, and telecommunications infrastructure. 5. Support the on-going design and development of the Inland Port rail facility and terminal. 6. Support the replacement and/or refurbishment of aged public infrastructure. 	
Strategic Projects, Programs, and Activities	
<ol style="list-style-type: none"> 1. Conduct responsible transportation and land use planning which accounts for the region’s growing population, increasing traffic challenges, and escalating need for jobs. 2. Provide strategic planning and grant writing to help increase the region’s economic development capacity in air travel and freight transport. 3. Support the expansion of the Port of Charleston by writing formal letters of support and providing analysis on how impactful the Port is to the SC Appalachian Region. 4. Provide strategic planning and grant writing services to support increased capacity and connectivity to water, sewer, rail, power, natural gas, and telecommunications infrastructure. 5. Assist with any technical support needed in the development of the Inland Port, including GIS, strategic planning, and grant-writing services. 6. Support the replacement and/or refurbishment of aged infrastructure through grant-writing and strategic planning services. 	
Strategic Partners: SCACOG; all County and City local economic developers and planners; the Upstate Alliance; the South Carolina Department of Commerce; the South Carolina Ports Authority; Greenville-Spartanburg International Airport and all other regional airports; all infrastructure grant providing agencies active in the region, including EDA, USDA, the Appalachian Regional Commission; U.S. Housing and Urban Development CDBG Program, SC DOT.	
Time Line: 2013-2017	

While a detailed inventory of assets is provided in the 5-Year CEDS, the most notable infrastructure development of this 12-Month *Update* has been construction of the **Inland Port in Greer** – the completion of which is scheduled for September of 2013. This 100-acre Greer rail development, which is located directly off of I-85 and adjacent to GSP International Airport, will have a transformational impact on international container movements between the **Port of Charleston** and the region. Referred to as “a port without water”, it will provide a place to transfer shipping containers between train and truck for shipments to/from the coast. The facility will improve the transport of freight on this 218-mile corridor by converting 50,000 all-truck container moves to more efficient multimodal moves. Adding to the impact of this development is the fact that nearly 2,600 acres of adjacent GSP International Airport property is being opened for economic development (discussed further in the next section, *Available Sites & Buildings*). As this update is being written, there is already a 400,000 square foot distribution facility being constructed on the site (expandable to 700,000 s.f.).

Clearly, the combined Inland Port and available GSP property will have a major impact on business logistics, capital investment, and job creation. The development combines the assets of interstate, airport, and rail in a way that the SC Appalachian Region has never seen. With this development, however, there will be significant infrastructure challenges. Conditions both on I-85 as well as all surrounding roads will face new traffic strains, and supporting utilities must also be updated responsibly. A major priority of CEDS 2013-2017 is to ensure that new development stemming from the Inland Port is planned responsibly in order to minimize congestion, to be environmentally responsible, and to promote a high quality of life in the region.

Another vital project area is to improve the regional network of Interstate Highways (I-85, I-26, I-185, I-385, and I-585). In June of 2013, the State Department of Transportation produced a list of its top seven **interstate improvement projects**, and three of them are found in the SC Appalachian Region. Construction in these sections of I-85 over the next several years will carry a major regional impact:

- **I-85/I-385 interchange in Greenville County**
- **I-85 widening in Greenville/Spartanburg counties (24.7 miles)**
- **I-85 widening in Spartanburg/Cherokee counties (28.36 miles)**

In addition to these notable SC DOT projects, **the widening of I-85 from two lanes in Anderson County** is an equally vital interstate project for regional economic development. Covered in the full CEDS Report, this project and general highway improvements throughout the region remain critical priorities.

Whether examining the Inland Port, notable interstate projects, or all other infrastructure areas covered in CEDS 2013-2017, the SC Appalachian Region shares the nation-wide challenge of addressing deteriorated infrastructure. There are numerous roads and bridges throughout the region in need of upgrades, including the US 29 Overpass that runs over I-85 in Anderson County (it needs to be heightened). The same is true for public water, sewer, rail, and all other types of public infrastructure facilities that have been worn by age and weather. CEDS 2013-2017 supports not only expanding infrastructure capacity to help foster new economic development, but also maintaining a quality business environment through existing infrastructure replacement and restoration.

Available Sites and Buildings

The following strategic plan for available sites and buildings is outlined in CEDS 2013-2017:

<u>CEDS 2013-2017 Strategic Plan</u>	
Goal: Improve regional economic development capacity by increasing the quality and quantity of shovel ready sites and suitable buildings for expanding and locating businesses.	
Supportive Findings	
<ul style="list-style-type: none"> • A region with an outstanding inventory of available sites and buildings is better positioned to land projects. • In an increasingly competitive environment where companies desire to expand or relocate quickly, site consultants use specific criteria to <i>filter up</i> to shovel ready, high capacity locations. • Without an impressive inventory of sites and buildings, communities are often not considered by prospects or even by existing companies that wish to expand. <i>Availability of Product</i> keeps communities in the hunt and provides positive visibility. 	
Objectives	
<ol style="list-style-type: none"> 1. Help <u>market</u> existing and future sites throughout the region. 2. Help improve the <u>availability</u> of sites throughout the region. 3. Help improve the <u>connectivity</u> of sites throughout the region. 4. Help improve the <u>develop-ability</u> of sites throughout the region. 5. Help improve the <u>inventory</u> of suitable, available buildings throughout the region. 	
Strategic Projects, Programs, and Activities	
<ol style="list-style-type: none"> 1. Utilizing <i>Infomentum Online</i>, a state of the art program offered by SCACOG, provide GIS data and mapping services to help economic developers <u>market</u> available sites and buildings throughout the region. 2. When they are not publicly owned, improve the <u>availability</u> of sites by encouraging communities to enter mutually beneficial, long-term option agreements between property owners and local economic development agencies. This will improve the region's ability to negotiate on more sound footing with prospects. 3. Improve the <u>connectivity</u> of sites by (1) helping communities assess site utility connections, (2) providing grant-writing and planning support to improve site utility connections. 4. Improve the <u>develop-ability</u> of sites by offering grant-writing and planning assistance for due diligence associated with environmental assessments, mitigations, and right-of-way/easement analysis. 5. Help improve the inventory of suitable, available buildings for prospects by offering grant-writing and planning assistance for the redevelopment of existing facilities and the development of speculative shell buildings, when (i) the community deems it appropriate, and (ii) when local market conditions deem it necessary for attracting expansion and location projects. 	
Strategic Partners: SCACOG; all County and City local economic developers throughout the region; the Upstate Alliance; the Appalachian Development Corporation; the South Carolina Department of Commerce; utility providers throughout the region; real estate developers throughout the region.	
Time Line: 2013-2017	

The past twelve months has been a very interesting year in this *CEDS Area of Emphasis*. First, lack of available product (sites, certified sites, industrial buildings) is cited by the region's economic developers as one of their most difficult challenges. When State project managers and private site location

consultants submit a *Request for Information* concerning a company that is looking for a new location, it has become the norm for them to look for certified sites and/or habitable buildings. As noted in the *Upstate SC Alliance* quarterly report entitled, *The Score, Q4 2012*:

“In 2012, 73% of Upstate SC Alliance requests were instigated by prospects looking for existing buildings. If this trend continues, the region may only be able to compete for about a quarter of upcoming projects until new industrial product becomes available. While some may be willing to wait six to nine months for build-to-suit, others will likely move on to markets where space is immediately available.”

While the private real estate market will always be the primary force behind meeting “product” demand for economic development prospects, there are vital project areas of public investment outlined in CEDS 2013-2017 which can support the process (see Strategic Plan table of previous page). The objectives are (1) to help increase the inventory of site and building product, (2) to help market that product, and (3) to improve product availability, connectivity, and developability.

One topic that has received particular attention over the past twelve months is the need to invest in the region’s *InfoMentum Suite of Services* – which is an award-winning, GIS-based support system that enables economic developers to produce fast, detailed radius reports and maps which help market their product. While InfoMentum remains a strong product, it is very difficult for any such system to keep up with rapid technological developments. Over the past twelve months, the region has learned that the State of SC will maintain its own searchable database of sites and buildings. Because the region’s local economic developers do not have time to update two different databases in order to market their product, the decision has been made for InfoMentum to share the State’s database rather than to continue maintaining a separate one. Maintaining the state-of-the-art, customized analytical tools of InfoMentum (radius reports, etc.) while converting to a new State database will require major technological configurations and resources. Along these same lines, it is essential for InfoMentum to become adaptable for mobile phones and tablets. CEDS 2013-2017 promotes support of these vital technical upgrades from all local, regional, state, and federal economic development partners.

While a directory of available site and buildings is provided in CEDS 2013-2017, one highly vital project that has accelerated over the past twelve months is the opening of GSP International Airport property for economic development. These nine tracts not only surround the airport, but (1) are located along I-85, (2) are adjacent to the new *Inland Port*, and (3) total to approximately 2,578 acres. While the goal of CEDS 2013-2017 is not to call attention to any one available site over another, a site of this size that is near such critical transportation assets has the potential to have a major impact on the region. Along with improving the inventory of product across the region, the responsible development of the airport site is a highly vital project that will require support from local, regional, state, and federal economic development partners.

Workforce Development

CEDS 2013-2017 Strategic Plan

Goal: Cultivate an efficient and skilled 21st Century workforce through enhanced training and coordination of resources in the SC Appalachian Region.

Supportive Findings

- Regional graduation rates have improved at all scholastic levels and the region has a population of workers large enough to accommodate virtually any economic development project.
- The availability of **technologically skilled manufacturing labor** presents significant challenges in regional economic development, as available skilled labor is important to the region's vital industrial clusters.
- With regional manufacturers in need of Certified Production Technicians (CPT's), Certified Logistics Technicians (CLT's), Computer Numerical Control operators (CNC's), mechatronix specialists, and the like, the effective coordination of workers and training programs is as challenging as it is essential.
- The region shares the significant state-wide challenges associated with illiteracy and the need for early childhood intervention and education.
- There is a broad array of programs, initiatives and educational institutions that serve as assets to the region's workforce development efforts.
- The state-wide *South Carolina Chamber of Commerce* has developed an outstanding list of goals and strategies which are reflective of the workforce challenges and opportunities in the SC Appalachian Region.

Objectives

1. Support the region's three Workforce Investment Boards (WIBs) and all of the programs they oversee.
2. Support the SC Technical College System and other professional schools and workforce organizations that are training the regional workforce and connecting it with employers.
3. Promote the workforce development goals and strategies developed by the South Carolina Chamber of Commerce.

Strategic Projects, Programs, and Activities

1. Continue to partner with regional WIB's through coordination, strategic planning, and grant writing assistance.
2. Provide strategic planning and grant writing services to technical colleges and other professional workforce organizations.
3. Offer assistance with strategic planning, technical support, and grant-writing to all the SC programs and partners that are working to achieve the workforce goals and strategies outlined by the South Carolina Chamber of Commerce.

Strategic Partners: SCACOG, the Worklink WIB; the Greenville County WIB; the Upstate WIB; all local school systems, colleges and universities within the region; all County and City local economic developers throughout the region; the Upstate Alliance; the South Carolina Department of Commerce.
 Note: please see the *SC Workforce Development Programs* table of this chapter for all institutional program partners.

Timeline: 2013-2017

Along with the availability of site and building product, the ability to supply enough technically qualified workers for the high volume of advanced manufacturing prospects is the top challenge cited by local economic developers. Not only is the SC Appalachian Region growing at a faster rate than the nation as a whole, but the technology of manufacturing is rapidly evolving. As cited in CEDS 2013-2017, “With regional manufacturers in need of Certified Production Technicians (CPT’s), Certified Logistics Technicians (CLT’s), Computer Numerical Control operators (CNC’s), mechatronix specialists, and the like, the effective coordination of workers and training programs is as challenging as it is essential.” This means that an increasing amount of resources should be devoted to strengthening this *CEDS Area of Emphasis*.

The South Carolina Chamber of Commerce and the SC Appalachian Economic Development District are aligned in their Workforce Development Goals to be achieved by year 2020 (outlined in the 5-Year CEDS). One of the major goals is to increase the number of workers who have been tested and have received a National Career Readiness Certificate from the ACT WorkKeys Program. Over the past twelve months, the region has made great progress in this area by participating in the new *ACT Work Ready Communities* initiative. South Carolina is one of the initial pilot states for this national program, which calls for individual counties to work with employers to promote higher workforce participation in ACT WorkKeys. Employers are being both educated on the program and asked, at a minimum, to voluntarily recognize the National Career Readiness Certificate when a job applicant presents one during an interview. This does not mean that the employers who volunteer are obligated to hire the person presenting a Certificate or even to show that person preferential treatment in their selection process. What it does mean, however, is that the employer has a basic understanding of what ACT WorkKeys is and what the National Career Readiness Certificate means – whether the applicant tests at a *Bronze, Silver, Gold, or Platinum* level. Increased awareness of this proven program by employers will provide an increased incentive for workers to participate in it and enhance their skill levels. Support for this initiative, along with all of the other workforce goals outlined in CEDS 2013-2017, is a vital project area for the region.

Lastly, state and federal workforce development funding has declined significantly over the past several years, and a clear sign of this decline was demonstrated over the past twelve months when a major consolidation of *Worklink Employment Centers* was forced in Anderson, Oconee, and Pickens counties. A total of three Employment Centers in the cities of Anderson, Seneca, and Liberty were closed and forced to consolidate their operations to nearby “QuickJobs Development Centers”, which are housed in the campuses of Tri-County Technical College. At a time when workforce development needs have never been more paramount, regional workforce partners are being asked to accomplish more with fewer resources. A critical priority for CEDS 2013-2017 is to work with local, regional, state, and federal partners to increase resources in order to support this vital project area.

Entrepreneurship

CEDS 2013-2017 Strategic Plan	
Goal: Make the SCACOG Region the most <i>entrepreneur friendly</i> region in South Carolina.	
Supportive Findings	
<ul style="list-style-type: none"> • Most jobs are created by small to mid-size business. • Keeping a business alive is often more difficult than starting a business, thus a nourishing entrepreneurial environment is critically important. • Many exciting initiatives have developed over the last several years which have given great momentum to the subject of regional entrepreneurship. 	
Objectives	
<ol style="list-style-type: none"> 1. Help communities develop a supportive environment for entrepreneurship. 2. Increase the number of small business incubators, accelerators, and soft landing programs throughout the region. 3. Continue to provide analytical tools which support entrepreneurial activity. 	
Strategic Projects, Programs, and Activities	
<ol style="list-style-type: none"> 1. Develop a region-wide, voluntary <i>Entrepreneur Friendly</i> program which allows individual communities to assess and improve upon their small business environments through a set of measurable steps. While details of this program are still under development, it will involve a core set of entrepreneur friendly criteria based upon <i>best practices</i> as well as a peer-to-peer review component which will allow good ideas to be shared throughout the region. 2. Provide strategic planning and grant-writing services to support existing and future small business incubators, accelerators, and soft landing programs throughout the region. 3. Continue to promote and update the Plan-A-Biz tool in order to provide assistance in small business decision analysis. 	
Strategic Partners: SCACOG; all local economic developers, chambers of commerce, and other community business groups throughout the region; the Appalachian Development Corporation; the South Carolina Department of Commerce; the Clemson University Small Business Development Center (SBDC); the Service Corps of Retired Executives (SCORE). Note: please see the <i>Exciting Initiatives</i> table of this chapter for other strategic partners.	
Time Line: 2013-2017	

Recognizing that small business plays an irreplaceable role in the U.S. economy, CEDS 2013-2017 called for the continued support of organizations and resources that are facilitating entrepreneurial growth in the region. These assets include not only organizations that support small business development, but also the incubators, accelerators, and “soft landings” facilities found throughout the region. While an inventory of these assets is provided in CEDS 2013-2017, the table below displays how several of them expanded their capacity over the past twelve months:

Regional Entrepreneurial Assets *Getting Stronger*

Expansion of the Center for Business and Entrepreneurial Development (CBED) - with grant support from the Economic Development Administration and the Appalachian Regional Commission, Spartanburg Technical College will renovate 22,000 s.f. of dead space to greatly expand the capacity of CBED. This 363,000 square foot multi-use incubator and soft landings facility is an invaluable tool for entrepreneurs to start up a new venture, jump start an expansion or relocation, beta test a new product line, and train employees on new products or processes.

The Mountain Lakes Business Development Corporation (incubator) expands to become the “Tri-County Entrepreneurial Development Corporation”. Partnering with Tri-County Technical College, this transition will expand this Oconee County incubator in both physical size and in resources by locating it in the *Seneca Commerce Center*. Plans are underway for the expansion and support will be required from local, regional, state, and federal economic development partners.

The **Clemson University – International Center for Automotive Research (CU-ICAR)** is expanding through construction of the new **Research One** building which will bring a combination of specialized classroom and incubation space for automotive start-up companies.

Greenville-based **The Iron Yard** is presently expanding its presence to Spartanburg. The Iron Yard is a 13-week, mentorship-driven startup accelerator. It focuses on talented teams with a prototype that can be brought to a large market. Teams are selected after a highly competitive application process. Tenants receive space, design assistance, legal/accounting services, experienced entrepreneurial mentorship, and \$20,000 in seed capital.

Note: Other entrepreneurial capacities exist throughout the region and this list is not intended to be comprehensive.

Another exciting entrepreneurial development over the past twelve months has been the successful application by the Economic Development District for an Appalachian Regional Commission grant to build the on-line, interactive **Entrepreneur Friendly Toolkit**. This dynamic product, which will be developed over the next twelve months, will focus on the *entrepreneurial community* as its direct client. By completing a set of eight interactive “steps”, communities throughout the SC Appalachian Region will strategically plan, market to, and foster the growth of local entrepreneurship. After finishing the eight steps, the community will hit “print” and a custom “Entrepreneur Friendly Action Plan” (PDF) will be produced with the community’s typed answers populating its content. Cited as a vital project in CEDS 2013-2017, the Toolkit will greatly increase entrepreneurial capacity in the region.

“Steps” of the Entrepreneur Friendly Toolkit

1. Resource Assessment
2. Centralized Information
3. Training and Assistance Programs
4. Networks
5. Business Sustainability Resources
6. Regulatory and Policy Environment Clarity
7. Clear Lines of Communication Between Business and Government Leadership
8. Leadership Promotion

Access to Capital

CEDS 2013-2017 Strategic Plan	
Goal: Support institutions and programs which provide much needed capital for job creating companies and projects in the SC Appalachian Region.	
Supportive Findings	
<ul style="list-style-type: none"> • Access to capital is a critical component of economic development. • While most business lending is handled rightfully by the private sector, there are situations in which government gap financing programs, loan guarantee programs, and private sector angel or venture capital networks can partner with banks to make impactful loans and investments. • There is an impressive network of economic development finance institutions working in the region. • There are valuable grant and tax credit programs working in the region to help foster investment and job creation. 	
Objectives	
<ol style="list-style-type: none"> 1. Support economic development finance institutions and programs which are making job-creating loans and investments. 2. Secure economic development grant support in order to support investment and job creation. 3. Support economic development tax credit programs which incentivize investment and job creation. 	
Strategic Projects, Programs, and Activities	
<ol style="list-style-type: none"> 1. Promote economic development finance institutions for capital-seeking projects throughout the region. 2. Continue to provide economic development grant writing services throughout the region. 3. Promote economic development tax credit programs by conducting research and sharing information with communities throughout the region. 	
Strategic Partners: SCACOG; all County and City local economic developers throughout the region; the Appalachian Development Corporation and other economic development finance institutions and programs throughout the region; the Upstate Alliance; the South Carolina Department of Commerce; the South Carolina Department of Revenue.	
Time Line: 2013-2017	

The condition of financial institutions in both the SC Appalachian Region and the entire state has healed considerably over the past twelve months. \$188 million in SBA lending over the first three quarters of 2013 represents a pace that is set to once again break a state record (set in 2012). While 14% of South Carolina lending institutions are currently unprofitable, that figure is down from 35% in 2010, 31% in 2011, and 18% in 2012. Regionally, SBA lending is also increasing. In addition to the several public-private federal revolving loan funds being administered by lenders such as the *Appalachian Development Corporation*, there are fifteen private banks in the region that are certified SBA lenders. While data is not available for all six counties, the combined amount of SBA loans in Greenville, Spartanburg, and Anderson Counties increased from sixty in 2011 to one hundred and thirty-seven in 2012 (a 128% increase). Year-end figures for 2013 promise to be even higher.³ In order to maintain the

³ Source: GSA Business Market Facts 2013.

region's strong capital environment which contributes to the creation of countless jobs, continued support from local, regional, state, federal economic development partners will be required.

Regional economic development grant activity is also strong. The table below displays a sample of exciting federal economic development grants that are currently under way in the SC Appalachian Region:

Some Exciting Federal E.D. Grant Projects in the Region			
Project Name	Grant Source	Grant Amount	Total Project Cost
City of Blacksburg, Oak Grove Water Project	CDBG and ARC	\$852,251	CDBG and ARC
Anderson Regional Joint Water System, Hartwell Intake Project	EDA	\$2,000,000	\$4,019,700
Anderson County, Tri-County Tech Quick Jobs Facility	ARC	\$500,000	\$1,210,492
Greenville Co. Recreation District, Swamp Rabbit Trail North	ARC	\$250,000	\$500,000
City of Travelers Rest, Outdoor Arts Center	ARC	\$500,000	\$1,087,125
Oconee County, SC Hwy 11 Sewer Project	ARC	\$500,000	\$1,800,000
City of Pickens, Town Creek Park Project	ARC	\$400,000	\$810,000
Town of Pacolet, River Passage Gateway Project	ARC	\$387,500	\$775,000
Spartanburg Community College, Center for Business and Entrepreneurial Development	ARC and EDA	\$1,340,000	\$1,700,000

Note: List is a snap shot of some notable projects and not intended to be comprehensive.

In addition to economic development grants and loans, tax credit programs (local, state and federal) continue to play an important role in job creation and capital investment. Free Trade Zone 38 along Interstate I-85 continues to be a great incentive for business location and expansion, and the South Carolina four-tier Job Tax Credit continues to incentivize job creation. For year 2013, Greenville County is classified as "Tier I – Developed"; Anderson, Oconee, Pickens, and Spartanburg Counties are "Tier II – Moderately Developed"; Cherokee County is "Tier III – Least Developed". None of the region's counties are considered "Tier IV – Distressed" by the SC Department of Revenue, which is a positive economic sign for the region.

Whether discussing loans, grants, or tax credits, there are many positive developments taking place in regional economic development finance. There are never enough resources, however, to accommodate all of the potential job-creating projects in the pipeline. Local, regional, state, and federal economic development partners must continue to work together to increase these resources and support more projects.

Local Asset-Based Economic Development

CEDS 2013-2017 Strategic Plan	
Goal: Strengthen the unique, local community assets which have a significant impact on regional economic development.	
Supportive Findings	
<ul style="list-style-type: none"> • Each of the six counties and 42 municipalities within the SC Appalachian Region possess unique assets from which residents derive economic opportunity. • With attractive natural resources, historic places, arts & entertainment, and sporting venues, the SC Appalachian Region has a strong tourism industry. • There is great potential of downtown areas in the region to foster economic growth and job creation. • The region is in position to capitalize on emerging opportunities in the agricultural industry, including inputs for manufacturing, local/organic produce markets, and agri-tourism. 	
Objectives	
<ol style="list-style-type: none"> 1. Make the SC Appalachian Region a globally recognized tourism destination. 2. Make the SC Appalachian Region known for its vibrant downtown areas. 3. Help communities reach the full economic potential of their rich agricultural resources. 4. Help communities further recognize, develop, and market their uniquely local economic development assets. 	
Strategic Projects, Programs, and Activities	
<i>For Objectives 1-4:</i>	
<ul style="list-style-type: none"> • Support tourism initiatives, downtown development, and agribusiness development throughout the region with strategic planning, marketing, and grant-writing efforts. • Conduct research and provide grant writing assistance in order to obtain formal marketing studies which aim to enhance local economic development assets. 	
Strategic Partners: SCACOG; all Chambers of Commerce and Convention and Visitor Bureaus throughout the region; all County and City local economic developers throughout the region; the Upstate Alliance; the South Carolina Department of Commerce; the South Carolina Department of Parks, Recreation and Tourism.	
Time Line: 2013-2017	

Each of the six counties and 42 municipalities within the SC Appalachian Region possess unique assets from which residents derive economic opportunity. Not all of these local assets make up “clusters” or lead to formal “target industries” for recruitment, but they are essential to the economic well being of individual communities and the region as a whole. While providing a detailed inventory of each community’s local assets is not practical for the purpose of the 2013 CEDS update, there are three broad asset categories that CEDS 2013-2017 emphasizes: Agribusiness, Tourism, and Downtown Development.

In June of 2013, an outstanding study was conducted by the *South Carolina Coastal Conservation League* and numerous regional partners on the feasibility of a **“Food Hub” for the SC Appalachian Region**. Entitled, “Upstate Region Local Food Hub Feasibility Study”, the document examines the potential for starting a regional food hub like the highly successful one found in Charleston, SC (“GrowFood

Carolina”). The study defines a regional food hub as, “a business or organization that actively manages the aggregation, distribution, and marketing of source-identified food products primarily from local and regional producers to strengthen their ability to satisfy wholesale, retail, and institutional demand.” While a local host organization to lead the effort and manage the operation is needed, the study offers the following basic conclusion in support of creating a regional food hub:

“The majority of other necessary pieces needed to establish a local food hub are in place. Local food supply and demand data, food producer survey results, retailer and consumer survey and interview results, demographic research, and farm data all show that there is the potential to increase local food supply and satisfy ever-increasing demand.”

The concept of increasing opportunities for local farmers via farmers markets and shared public-private processing facilities is emphasized as a CEDS 2013-2017 *Area of Emphasis*. Numerous local initiatives have taken off, but the idea of a central food hub takes the concept to a new level of regionalism.

While CEDS 2013-2017 provides a directory of exciting tourism and downtown development assets from across the region, economic development activity in these two areas over the past twelve months has remained strong. Whether examining the exciting new “Main Street Challenge” in the City of Spartanburg, which is a competition for valuable space and incentives for up to three promising entrepreneurs to locate on Main Street, or the fact that the region continues to draw world class conferences, such as the “Best Plants Conference” from *Industry Week Magazine*, the local asset-based economy is vital to the well being of the region. Support from local, regional, state, and federal partners is needed to foster the development in this vital project area.

Section VI: Conclusion

Building on a Strong Year

The first twelve months of CEDS 2013-2017 was a tremendous period in the SC Appalachian Region. Each of the strategy's *Seven Areas of Emphasis*, which includes (1) *Clusters, Target Industries, and Innovation Capacities*, (2) *Infrastructure*, (3) *Available Sites and Buildings*, (4) *Workforce Development*, (5) *Entrepreneurship*, (6) *Access to Capital*, and (7) *Local Asset-Based Development*, saw exciting developments and capacity expansion. The cluster-based, target industry approach to recruiting is yielding outstanding results, with nearly \$647 million in capital investment and 2,067 new jobs over 45 announcements since September 2012. The new Inland Port will have a transformational impact on business logistics throughout the region. Twelve months from now, thanks to federal economic development partners, the new *Entrepreneur Friendly Toolkit* will be complete—establishing a customized on-line planning tool for communities to attract and develop local entrepreneurs. The past twelve months have also laid the groundwork for the creation of a central food hub to improve the agricultural economy and public health of the region. The list of highlights could go on, but what is most important to remember is the fact that there is still a great deal of work to do in order for the region to reach economic parity with the nation.

Continued Plan of Action

SCACOG, serving as the federal Economic Development District, will continue to work with the CEDS Steering Committee to support the vital projects which aim to create economic growth in the region. SCACOG will:

- Continuously evaluate the CEDS 2013-2017 *Goals and Objectives* in relation to qualitative and quantitative performance measures;
- Support the *Strategic Projects, Programs and Activities* outlined for each *Area of Emphasis* in CEDS 2013-2017;
- Help execute on-going and future *Vital Projects* of CEDS 2013-2017;
- Provide EDA with annual CEDS progress updates.

SCACOG will carry out CEDS 2013-2017 in a manner which:

- Promotes economic development and opportunity;
- Fosters effective transportation access;
- Enhances and protects the environment;
- Maximizes effective development and use of the workforce consistent with any applicable State or local workforce investment strategy;
- Promotes the use of technology in economic development, including access to high-speed telecommunications;
- Balances resources through sound management of physical development; and
- Obtains and utilizes funds and other resources.