GREATER MSP is fulfilling the original vision of a true regional economic development partnership.

GREATER MSP is now a regional partnership with 2000 leaders, 200 organizations, and 20 staff.

- Expect bigger results
- Bolder ambition
- Shared ownership
Private Sector Investors

129 Private Investors = 76%

Public Sector Investors

28 Public Investors = 19%

Foundation Investors

4 Foundation Investors = 5%

Civic Partners
Regional VISION

The Greater MSP region leads the world in inclusive economic growth by welcoming all, empowering talent & igniting innovation.

Partnership MISSION

The GREATER MSP Partnership accelerates regional competitiveness and inclusive economic growth through job creation, capital investment & execution of strategic initiatives.

Partnership VALUES

Accountability
Alignment
Inclusion
Innovation
Transparency
### Regional Economic Development Strategy

**What the region needs to do to become more competitive**

<table>
<thead>
<tr>
<th>Strategic Pillars</th>
<th>Regional Strategy Objectives</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>BUILD GLOBAL SECTORS</strong></td>
<td><strong>Strengthen Key Sectors</strong></td>
</tr>
<tr>
<td></td>
<td><em>Business retention / expansion / attraction, exports, FDI</em></td>
</tr>
<tr>
<td></td>
<td><strong>Innovate to Drive Growth</strong></td>
</tr>
<tr>
<td></td>
<td><em>Start-ups, corporate R&amp;D, and more</em></td>
</tr>
<tr>
<td></td>
<td><strong>Invest in livability</strong></td>
</tr>
<tr>
<td></td>
<td><em>Affordability, mobility, environmental sustainability</em></td>
</tr>
<tr>
<td><strong>PRIORITIZE TALENT</strong></td>
<td><strong>Attract &amp; Retain professional talent</strong></td>
</tr>
<tr>
<td></td>
<td><em>Tech, professionals of color, newcomers, interns</em></td>
</tr>
<tr>
<td></td>
<td><strong>Develop our Residents’ Skills</strong></td>
</tr>
<tr>
<td></td>
<td><em>Adult worker training and retraining; higher-education</em></td>
</tr>
<tr>
<td></td>
<td><strong>Include All Races in Opportunity</strong></td>
</tr>
<tr>
<td></td>
<td><em>Better economic outcomes for diverse populations</em></td>
</tr>
<tr>
<td><strong>TELL OUR STORY</strong></td>
<td><strong>Inspire Action from Data</strong></td>
</tr>
<tr>
<td></td>
<td><em>Identifying leaders and organizations to take on pressing issues</em></td>
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<td><strong>Make MSP a Global Brand</strong></td>
</tr>
<tr>
<td></td>
<td><em>Marketing the MSP region around the U.S. and world</em></td>
</tr>
<tr>
<td></td>
<td><strong>Rally Regional Storytellers</strong></td>
</tr>
<tr>
<td></td>
<td><em>Leaders acting as ambassadors for the region’s story</em></td>
</tr>
</tbody>
</table>
Portfolio of Strategic Initiatives
GREATER MSP Partnership

STRATEGIC INITIATIVE
Execution Hub
Led by Staff of GREATER MSP

TALENT
TALENT RETENTION & ATTRACTION

URBAN GROWTH
URBAN ECONOMIC DEVELOPMENT

CENTER CITIES

WORKFORCE DEVELOPMENT

DIVERSE PIPELINE
TALENT INCLUSION

CONNEXT MSP

FOOD & AG
FOOD & AG SECTOR GROWTH

INNOVATION
FORGE NORTH
START-UPS & INNOVATION

AIR SERVICE

REGIONAL AIR SERVICES PARTNERSHIP
MORE FLIGHTS AT MSP AIRPORT

POHLAD
BEST BUY
WELLS FARGO

GREATER METROPOLITAN WORKFORCE COUNCIL
RAMSEY COUNTY
ANoka COUNTY
McKinsey & Company

MBOLD
LAND O’ LAKES, INC.

THE MCKNIGHT FOUNDATION

MORE FLIGHTS AT MSP AIRPORT

ECOLAB

PORTFOLIO OF STRATEGIC INITIATIVES

THOMSON REUTERS
HUB
HUBBARD

MORTON CLINIC
MOORE

XCEL ENERGY

US BANK
SAVO
Retaining & Attracting Talent

MSP TECH
Attracting software developers and other technology talent

MAKE IT. MSP.
Working together to make the Minneapolis-Saint Paul region top 10 in USA for professional net migration

MSP HELLO
Welcoming newcomers that brings together hundreds of new and long-time residents

BE MSP
Connecting professionals of color and building more inclusive workplaces

MSP CAMPUS
Converting summer interns and supporting on campus recruiting
THE MSP TECH ISSUE | 2019

MAKE IT, MSP: INSIGHTS
TECH TALENT IN THE MINNEAPOLIS-SAINT PAUL REGION

Make It. MSP.       New Products

Key fact 1

Key fact 2

Circle size reflects the current number of tech jobs in market.

CURRENT SIZE OF TECH LABOR FORCE WITH GROWTH RATE IN TOP US URBAN CENTERS

<table>
<thead>
<tr>
<th>CITY</th>
<th>2017 TECH JOBS</th>
<th>5 YEAR CHANGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Austin</td>
<td>83,832</td>
<td>22%</td>
</tr>
<tr>
<td>Charlotte</td>
<td>68,297</td>
<td>23%</td>
</tr>
<tr>
<td>Columbus</td>
<td>67,640</td>
<td>13%</td>
</tr>
<tr>
<td>Denver</td>
<td>69,272</td>
<td>18%</td>
</tr>
<tr>
<td>Kansas City</td>
<td>66,789</td>
<td>11%</td>
</tr>
<tr>
<td>MSP</td>
<td>136,313</td>
<td>10%</td>
</tr>
<tr>
<td>Nashville</td>
<td>43,155</td>
<td>15%</td>
</tr>
<tr>
<td>Seattle</td>
<td>196,584</td>
<td>14%</td>
</tr>
</tbody>
</table>

TIMES CHANGE. For instance, Minnesota’s well-documented leadership at the dawn of supercomputing preceded the branding of Silicon Valley and its growth in the information age. Today, while growth continues in the Bay Area, tech employment in the rest of the country is catching up. During the last five years, metros like Seattle, Charlotte, Austin, and Nashville have experienced the highest rates of growth.

The Greater Minneapolis Saint Paul region (MSP) has experienced 10% growth in tech jobs over the last 5 years, a significant increase in tech employment for a metro its size. This follows a similar trend being experienced by metros across the Midwest and Sunbelt, as high tech moves into more affordable markets with educated workforces and an ability to attract and retain talent.

However, the growth rate in MSP is not keeping pace with other tech hubs, including metros in the South like Charlotte, Austin, and Nashville, or others in the Midwest like Columbus and Kansas City.

TECH HAS INFILTRATED EVERY INDUSTRY, TRANSFORMING REGIONAL ECONOMIES

The increasing concentration of tech jobs is not just in traditional IT services, but also manufacturing, business services, headquarters, insurance, finance, and government.

For example, more than half of publishing industry jobs in metros like Seattle and San Jose are now tech and nearly half in metros like Austin, Denver, and Charlotte. In some
DEVELOP IN MSP

MINNEAPOLIS-SAINT PAUL IS ONE OF THE LARGEST AND FASTEST GROWING TECH REGIONS IN THE COUNTRY. COME TO A PLACE WHERE YOU CAN PLANT ROOTS AND BRANCH OUT.

SUBMIT YOUR INTERESTS TO LEARN MORE ABOUT LIVING AND WORKING IN MINNEAPOLIS-SAINT PAUL.

GET STARTED
Impact: Success Building our Economy

REGIONAL AIR SERVICES PARTNERSHIP

Global Connectivity

4 new int’l routes
Seoul, Dublin, Mexico City, Shanghai

MAKE IT. MSP.

Talent Attraction & Retention

300% increase
Net millennial migration

GOOGLE DATA CENTER

Business Investment Win

$600m investment
ccc

DAILY PAY

Business Investment Win

100 new jobs
Fast-growth fintech firm
2019 is our 5th year of tracking the economic performance of our region and benchmarking against peers.
June 24 Event Preview

- **2019 MSP Regional Indicators Dashboard**

- **5-year trend analysis**
  - Where are we improving most?
  - Where are we falling behind?
  - Where do we need goals to focus resources & motivate progress?

### Employment Gap (White-Of Color) Trend

<table>
<thead>
<tr>
<th>City</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
<th>2019</th>
<th>5-YR Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Atlanta</td>
<td>5.5%</td>
<td>6.7%</td>
<td>5.3%</td>
<td>3.7%</td>
<td>4.0%</td>
<td>1.5%</td>
</tr>
<tr>
<td>Austin</td>
<td>4.7%</td>
<td>6.4%</td>
<td>5.1%</td>
<td>5.0%</td>
<td>3.4%</td>
<td>1.3%</td>
</tr>
<tr>
<td>Boston</td>
<td>7.2%</td>
<td>9.0%</td>
<td>7.9%</td>
<td>7.6%</td>
<td>6.5%</td>
<td>0.7%</td>
</tr>
<tr>
<td>Charlotte</td>
<td>-0.1%</td>
<td>-1.3%</td>
<td>4.1%</td>
<td>4.9%</td>
<td>2.4%</td>
<td>-2.5%</td>
</tr>
<tr>
<td>Chicago</td>
<td>12.3%</td>
<td>11.8%</td>
<td>10.5%</td>
<td>9.9%</td>
<td>8.5%</td>
<td>3.8%</td>
</tr>
<tr>
<td>Dallas</td>
<td>5.6%</td>
<td>6.0%</td>
<td>4.4%</td>
<td>4.3%</td>
<td>4.7%</td>
<td>0.9%</td>
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<tr>
<td>Denver</td>
<td>7.7%</td>
<td>8.6%</td>
<td>8.3%</td>
<td>7.6%</td>
<td>5.4%</td>
<td>2.3%</td>
</tr>
<tr>
<td>MSP</td>
<td>13.0%</td>
<td>13.0%</td>
<td>10.0%</td>
<td>11.3%</td>
<td>8.6%</td>
<td>4.4%</td>
</tr>
<tr>
<td>Pittsburgh</td>
<td>11.7%</td>
<td>13.7%</td>
<td>12.5%</td>
<td>12.7%</td>
<td>10.1%</td>
<td>1.6%</td>
</tr>
<tr>
<td>Portland</td>
<td>3.6%</td>
<td>4.0%</td>
<td>2.7%</td>
<td>4.3%</td>
<td>2.8%</td>
<td>0.8%</td>
</tr>
<tr>
<td>San Francisco</td>
<td>6.5%</td>
<td>6.0%</td>
<td>5.8%</td>
<td>5.6%</td>
<td>5.5%</td>
<td>1.0%</td>
</tr>
<tr>
<td>Seattle</td>
<td>6.5%</td>
<td>5.1%</td>
<td>5.4%</td>
<td>5.2%</td>
<td>3.9%</td>
<td>2.5%</td>
</tr>
</tbody>
</table>

**Key Findings**
- MSP experienced largest decrease (improvement) 2015 to 2019 (4.4% decrease)
- Charlotte experienced largest increase (decline) 2015 to 2019 (2.5% increase)
Regional Competitiveness Pyramid

Performance

Strategy

GOALS
Fall 2019

Execution

BUILD GLOBAL SECTORS
- Strengthen Key Sectors: Business retention, expansion, attraction
- Innovate to Drive Growth: Startups, corporate R&D, and more
- Invest in Vitality: Affordability, mobility, environmental sustainability

PRIORITIZE TALENT
- Attract & Retain professional talent: Tech, professionals, niche, universities, interns
- Develop our Residents’ Skills: Job training, mentoring, higher education
- Include All Races in Opportunity: Better economic outcomes for diverse populations

TELL OUR STORY
- Inspire Action from Data: Identifying leaders and organizations to take on pressing issues
- Make MSP a Global Brand: Marketing the MSP region around the U.S. and world
- Rally Regional Storytellers: Leaders acting as ambassadors for the region’s story
Invitation – Be a part of your regional economic development partnership

SUMMER 2019

2019 Indicators Dashboard Release
- June 24

Forge North Launch
- July 24

MSP Business Investment Summit
- Aug 5

MSP Welcome Week
- Sep 12-18

Performance & Competition

Start ups & Innovation

Deals, Job Creation & Investment

Talent Attraction & Retention

GREATER MSP®
Let’s talk

Questions?
Idea?
So, what is the real story?

- Regions = geography of competition
- Compete, win as a team
- Need to be ready
- Learn from the big “winner” (VA)