



**Capital Area
Council of
Governments**

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Bastrop

Blanco

Burnet

Caldwell

Fayette

Hays

Lee

Llano

Travis

Williamson

Counties

Comprehensive Economic Development Strategy 2010 - 2015

Capital Area Economic Development District

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Capital Area Comprehensive Economic Development Strategy 2010-2015

I. Introduction

Every five years CAPCOG staff ramps up our economic development planning by calling a meeting of the CEDS Committee. Inevitably, the same questions are asked: what is a CEDS, what is its presumed purpose, do local economic developers have to follow it, and what happens to it after it's adopted?

This document is done to fulfill a requirement of the Economic Development Administration, U.S. Department of Commerce, for the planning funds received by the Capital Area Council of Governments as a designated Economic Development District (EDD). The Capital area consists of ten counties in central Texas, including the Austin-Round Rock-San Marcos Metropolitan Statistical Area (MSA). EDA requires that a Comprehensive Economic Development Strategy or CEDS be done every five years, ideally with annual updates as appropriate.

There is currently a lot of discussion at the EDA Headquarters in Washington D.C. about best practices for the CEDS, a document which has been intended to serve as a region's economic development plan. Those discussions have centered on how the EDDs can use the CEDS to add the most value to their region's economic competitiveness. The funding provided to the EDDs is modest; nevertheless many EDDs across the U.S. have enthusiastically broadened their CEDS to include transportation and environmental issues, to address housing and land use, and to strengthen education and healthcare strategies. For some smaller regions, the CEDS ends up being the only regional plan for growth thus taking on an important role for shaping strategies of local governments. In larger metro regions like ours, the CEDS is but one of many plans being developed and must find a niche for how it can add value.

The goal of this CEDS process wasn't to produce a 150 page report that would just occupy space on a shelf, rather it was written concisely to hopefully influence decisions being made that can impact the broader region, whether they are implemented by a city, county, or regional stakeholder. Our past CEDS plans were ambitious and addressed many of the issues mentioned above but with only two staff members working on economic and community development, the impact is limited. CAPCOG's CEDS has also moved away from an emphasis on multiple projects and now focuses more on providing data and support for good policy decisions at all levels.

Our CEDS is not intended to provide guidance to individual cities about what they need to be doing in their economic development programs; rather we believe our role is to look at our region as unit of cities and counties that compete globally for employers and workers. The Austin Metropolitan Region is a collection of cities, suburbs, and rural areas that are becoming increasingly interdependent economically; Census data show 77 percent of workers in this region cross a county line to get to their jobs.

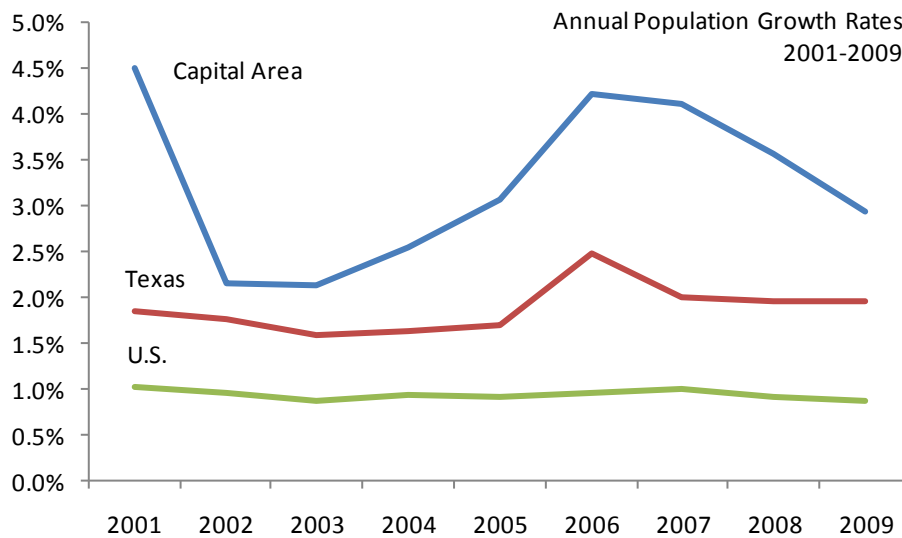
A recent article in Citiwire discusses why some regions are so attractive, including Austin. The traditional economic development issues still are considered – real estate costs, taxes, and labor costs – but also significant is an entrepreneurial environment made possible by the talent pool, university collaboration, and support for new growth. Interpret this to mean that a region has a better chance for a robust economy if it mixes entrepreneurship and innovation into established as well as start-up businesses. These knowledge-based businesses pay the best wages, depend on a well-educated workforce, and thus, don't move overseas.

So the 2010-15 CEDS acknowledges this trend and focuses on four goals that support it – those goals address workforce, entrepreneurship, economic competitiveness, and advocate for growth of clean energy as a knowledge-based industry.

II. Background

Population Growth

The Capital Area is a growing region with an economy that is performing well overall compared to other U.S. regions. The region is gaining an average of 49,000 residents per year and growing nearly twice as fast as the Texas population and nearly four times as fast as the U.S. population.ⁱ Since 2000, the population in the Capital Area has increased almost 35% from 1,346,833 to an estimated population of 1,816,818 in 2009.



Over the past decade, the Austin-Round Rock-San Marcos Metropolitan Statistical area (MSA), which consists of Travis, Williamson, Hays, Bastrop and Caldwell counties, registered the eighth fastest growth rate in the nation and ranked twelfth in the number of new residents added. As a result, the metro area is now the 35th largest in the nation. In addition to the rapid growth within the core of the region, the remaining five counties, Blanco, Burnet, Fayette, Lee, and Llano are also experiencing steady growth.ⁱⁱ

Although the City of Austin adds the most number of new residents than any other city in the region on average 13,000 people per year over the past decade, 71% of the growth has occurred outside Austin during this period of time. For every 100 hundred new residents in the Capital area, 29 are in Austin; 11 in Round Rock; 7 in Cedar Park; 5 each in the four cities of Kyle, Georgetown, Pflugerville, San Marcos; 4 in Leander; 3 in Hutto; 13 in all other cities and towns; and 13 in unincorporated portions of the counties.ⁱⁱⁱ

Approximately 92% of the region's growth during this period has occurred along the IH-35 corridor in Hays, Travis, and Williamson counties, which combined contain approximately 88% of the region's population. Throughout the decade, both Williamson and Hays counties consistently made the lists of the fastest growing counties in the state and nation. From the period 2000 to 2009, Williamson County experienced a 64.3% growth rate, the ninth fastest in the entire nation and Hays County at 59.4% was

fifteenth.^{iv} By comparison, the United States averaged a 9.1% growth rate and the state of Texas a 15.9% rate during the same period of 2000 to 2009.

The table below shows the growth for each county in the region over the past decade. The majority of the region's growth stemmed from net migration. In fact, 67.6% of the growth occurring from 2000 to 2009 was the result of individuals moving to the region. Natural growth (births minus deaths) played a much smaller role and in some counties such as Fayette and Llano, there were more deaths than births. The residual difference are changes in the population that are not directly attributable to demographic change and may be the result of methodology.

Components of Population Change, 2000- 2009^v

Entity	Estimate Base 2000	Estimate 2009	Numeric Change	Natural Increase	Net Migration	Residual Difference
Bastrop	57,716	74,876	17,160	3,990	13,335	-165
Blanco	8,418	9,198	780	106	717	-43
Burnet	34,164	45,149	10,985	832	10,260	-107
Caldwell	32,185	37,810	5,625	2,301	3,473	-149
Fayette	21,819	22,891	1,072	-543	1,735	-120
Hays	97,582	155,545	57,963	10,905	47,048	10
Lee	15,657	16,231	574	596	79	-101
Llano	17,031	18,274	1,243	-1,066	2,324	-15
Travis	812,284	1,026,158	213,874	102,653	115,762	-4,541
Williamson	249,979	410,686	160,707	37,705	122,942	60
CAPCOG	1,346,835	1,816,818	469,983	157,479	317,675	-5,171

There are many population projection scenarios available, but perhaps the best one for short term planning is the State Data Center's Scenario 2000-2007, which uses migration trends from that period. Under this scenario the Capital Area region will surpass the 2 million mark within the next few years; and by 2015, the projected population will be 2.1 million, an increase of 16.8% from the 2009 estimate. All counties within the region will experience growth in the next five years according to this scenario.

Population Projections, 2010-2015^{vi}

Entity	2010	2015	Percent Increase
Bastrop	81,717	96,023	18%
Blanco	10,348	11,421	10%
Burnet	47,581	55,375	16%
Caldwell	38,724	42,280	9%
Fayette	25,232	27,314	8%
Hays	164,078	204,397	25%
Lee	18,119	19,335	7%
Llano	19,344	20,456	6%
Travis	992,773	1,082,986	9%
Williamson	435,355	560,673	29%
CAPCOG	1,833,271	2,120,260	16%

Job Growth

Job growth in the Capital Area is outpacing both the state and the U.S. economy. Regional employment has increased by 3.5% per year since 2002—or 31,500 net new jobs on average—compared to 2.4% in Texas and 1.1% in the U.S.^{vii} The table below summarizes job growth by 2-digit North American Industry Classification System (NAICS) codes from 2002-2015.

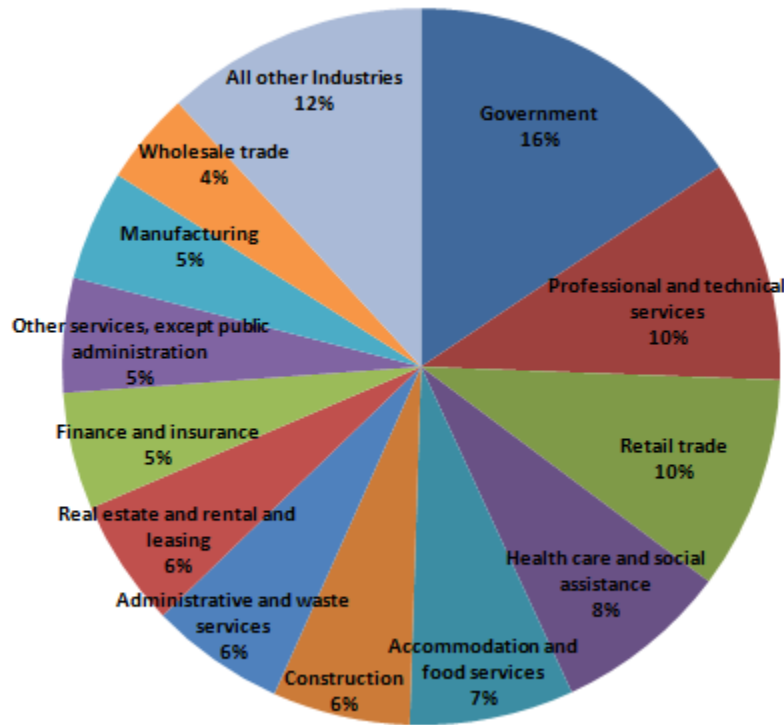
Jobs by Industry for Capital Area region, 2002-2015^{viii}

Description	2002	2010	2015	Percent Increase '02-10	Percent Increase '10-15
Agriculture, forestry, fishing & hunting	18,278	17,849	17,907	-2.3%	0.3%
Mining	7,303	12,022	13,703	64.6%	14.0%
Utilities	2,204	2,626	2,709	19.1%	3.2%
Construction	60,397	71,602	84,631	18.6%	18.2%
Manufacturing	68,489	57,265	56,909	-16.4%	-0.6%
Wholesale trade	38,157	48,180	52,286	26.3%	8.5%
Retail trade	90,679	110,767	120,285	22.2%	8.6%
Transportation and warehousing	19,213	22,428	24,510	16.7%	9.3%
Information	27,397	27,548	30,027	0.6%	9.0%
Finance and insurance	42,668	60,731	68,820	42.3%	13.3%
Real estate and rental and leasing	37,520	66,290	79,772	76.7%	20.3%
Professional and technical services	75,242	114,994	135,717	52.8%	18.0%
Management of companies	5,168	6,758	7,557	30.8%	11.8%
Administrative and waste services	53,195	70,148	82,119	31.9%	17.1%
Educational services	13,043	20,233	24,082	55.1%	19.0%
Health care and social assistance	66,212	91,040	105,795	37.5%	16.2%
Arts, entertainment, and recreation	19,098	27,119	31,229	42.0%	15.2%
Accommodation and food services	61,446	85,476	95,780	39.1%	12.1%
Other services, except public administration	43,195	59,450	64,780	37.6%	9.0%
Government	151,362	179,847	197,523	18.8%	9.8%
Total	900,266	1,152,374	1,296,140	28.0%	12.5%

Industries such as professional/technical services and health care have added 25,000 or more jobs during the last eight years. Other big gainers include government, which added over 28,000 jobs, accommodation and food services, 24,000; and retail trade, 20,000. Like many regions across the country, manufacturing has been declining with 11,000 fewer workers in that industry since 2002. While employment levels have declined sharply from their peaks a decade ago, the Capital Area remains one of the most competitive regions in the U.S. for technology manufacturing industries, such as semiconductors and testing instruments. The fastest growing industry in the region from 2002 to 2010 in terms of percent increase in number of jobs was the real estate and rental/leasing industry with an increase of 77%. Mining, educational services, and professional and technical services all grew by over 50% during this period.^{ix}

Government jobs made up the largest percentage of the total jobs, while professional and technical services and retail trade were second and third. The following chart shows the distribution of jobs in each industry compared to the total number of jobs in 2010.

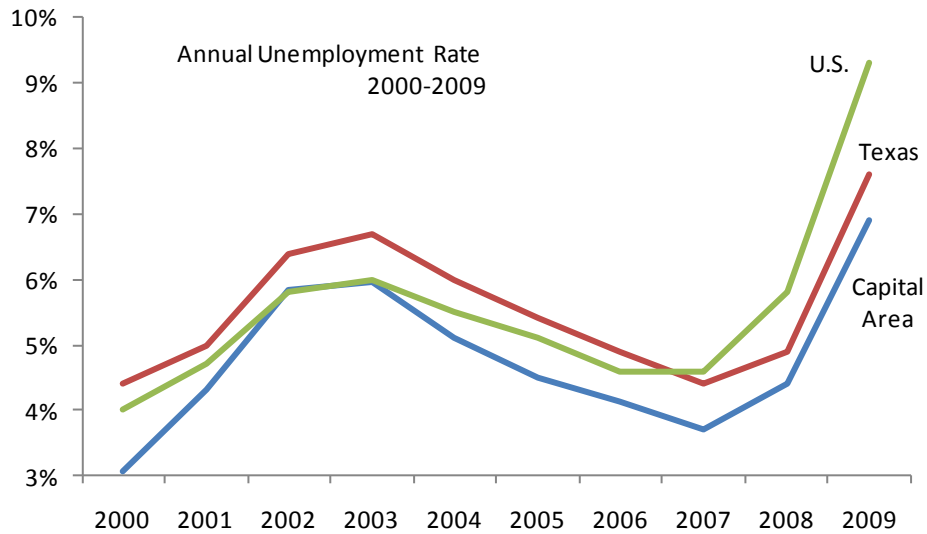
Jobs by Industry for Capital Area region, 2010^x



The transition to technology services—system design, software as a service, custom programming—has already found solid footing in the Capital Area and will help the region retain its competitive advantage. Finally, the Capital Area is well-positioned to take advantage of expected growth in emerging sectors such as renewable energy and clean technology. Forecasts indicate that the Capital Area could gain more than 12,000 jobs in “green” industries between 2010 and 2015.^{xi}

Unemployment Rate

The Capital Area has experienced job losses during the current recession that began at the end of 2007. Although the 2009 annual unemployment rate was at 6.9% compared to 3.1% in 2000, the rate has remained at levels that are better than both the national and state rate. There are 40,000 more unemployed people in the Capital region from 2000 to 2009; however, the labor force has also grown by 20% during that same timeframe. The graph on the next page summarizes the unemployment rate for the nation, state, and region since 2000.^{xii}



Educational Attainment and Wealth

The Capital Area, which includes the Austin-Round Rock-San Marcos Metropolitan Statistical Area (MSA) plus Blanco, Burnet, Fayette, Lee, and Llano counties, is routinely found among the leaders in “best of” lists offered by *Forbes*, *Kiplinger*, *Brookings*, and others.^{xiii} Yet, the region has its challenges. For example, a significant portion of the region’s job growth has occurred in industries with relatively low average wages, such as retail, restaurants, hotels, and other local services. While job growth in those industries is better than no job growth at all, it’s resulted in a concerning trend: Austin-Round Rock-San Marcos has ranked near the bottom of all U.S. metro areas in average earnings and per capita income growth. In fact, the region’s per capita income fell from 103 percent of the U.S. average in 2001 to 93 percent of the U.S. average in 2008. High-wage job creation and renewed focus on workforce skills will be needed to reverse that trend.

Educational attainment is another area that needs attention. Austin-Round Rock-San Marcos MSA bills itself as “The Human Capital,” and it’s true that the region compares favorably to other U.S. metros on rankings such as percentage of population age 25+ with at least a bachelor’s degree. However, that overall statistic for the region hides glaring disparities between race/ethnicity groups. Seventy-one percent of Asians age 25+ in the Austin-Round Rock-San Marcos MSA have a completed postsecondary degree, compared to 54 percent of Whites, 31 percent of African Americans, and 21 percent of Hispanics.^{xiv} Hispanics have accounted for 47 percent of the region’s population growth since 2001, and they are projected to be the fastest growing segment of the region’s population for the foreseeable future. With more and more high-wage jobs requiring some form of postsecondary education, the region must close these gaps and continuously improve educational attainment for all groups if it hopes to maintain a world class workforce.

**Educational Attainment by Race/Ethnicity for Population Age 25+
in Austin-Round Rock-San Marcos MSA, 2008^{xv}**

	Asian	Black	Hispanic	White
No H.S. Diploma or GED	8%	13%	36%	5%
H.S. Diploma or GED	12%	28%	25%	17%
Some college, no degree	9%	28%	18%	24%
Associate's degree	5%	8%	5%	8%
Bachelor's degree	32%	16%	12%	30%
Graduate degree	34%	7%	5%	17%
Postsecondary degree	71%	31%	21%	54%

As one of the fastest growing regions in the U.S., the Capital Area cannot become complacent by relying on population growth to drive its economic development. The region must pursue goals and strategies that align secondary and postsecondary education, economic development, and workforce development in a way that promotes innovation, creates high-wage jobs, and improves quality of life in rural and urban communities. The region must also ensure that economic policies and programs are conducted in coordination with land use, transportation, and housing objectives. With no single agency responsible for all aspects of regional planning in the Capital Area, the region’s success will depend on its ability to collaborate across city and county boundaries to address opportunities and challenges together.

III. Analysis of Economic Development Problems and Opportunities

Data Analysis

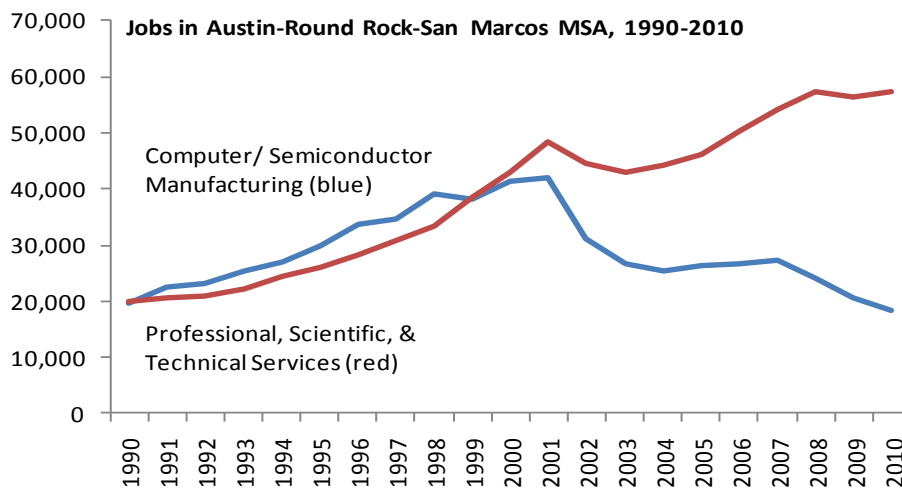
Considerable work has been done already analyzing the problems and opportunities of economic development in the Capital Area. In 2007, the Austin Chamber of Commerce published a detailed study and a strategic plan related to its *Opportunity Austin* program.^{xvi} The Chamber is currently targeting five clusters under this plan: convergence technologies, creative media, green industries, corporate and professional headquarters or regional offices, and health care and life sciences. While the study was completed before the recession that began in December 2007, most of the opportunities and challenges identified in the report are still relevant today.

Workforce competitiveness is another area receiving significant attention. Organizations such as E3 Alliance (Education Equals Economics) and the Ray Marshall Center for the Study of Human Resources at The University of Texas Austin are engaged in several innovative research projects that demonstrate the linkages between the classroom and the labor market. The Student Futures Project, for example, is a collaboration involving the Ray Marshall Center, Austin Chamber of Commerce, Texas Education Agency, and many of the region’s school districts.^{xvii} Researchers are linking secondary school records to college records and unemployment insurance records to track students as they move from school out into the workforce. The Student Futures Project and others like it are producing compelling evidence about the degree to which economic competitiveness is tied to education and workforce competitiveness—and why the Capital Area must address them together in a comprehensive economic development strategy.

The Capital Area Council of Governments (CAPCOG) is maintaining a comprehensive set of economic and workforce indicators on its website to provide data context to this 2010-2015 Comprehensive Economic Development Strategy (CEDS).^{xviii} The data is presented in the form of a regional asset map according to the framework described in *Illuminate* by the Council on Competitiveness.^{xix} The asset map provides an assessment of up-to-date regional indicators on topics such as human capital, capital availability, and metrics speaking to the region’s capacity for innovation-driven economic development. The asset map can be accessed on CAPCOG’s Information Clearinghouse.^{xx}

Economic Clusters

Industry clusters are “geographic concentrations of competing, complementary, or interdependent firms and industries that do business with each other and/or have common needs for talent, technology, and infrastructure.”^{xxi} The Capital Area’s industry cluster profile is in a transition period. In a pattern that has repeated itself across the U.S., after peaking in 2001 at around 40,000 jobs, technology manufacturing employment has declined by approximately 50 percent. Some of the jobs went overseas and some of the jobs simply don’t exist anymore. Yet, much of the Capital Area’s former strength in computer and semiconductor manufacturing has transitioned into technology services, such as software-as-a-service, computer and network system design, and consulting industries.



Source: Texas Workforce Commission, CAPCOG. Not seasonally adjusted.

The Capital Area is also home to many emerging industry clusters, including renewable energy and clean technology. The Pecan Street Project, for example, is a public-private partnership which includes Austin Energy, City of Austin, Environmental Defense Fund, Austin Chamber of Commerce, and the Austin Technology Incubator at The University of Texas at Austin that is establishing Austin as “America’s clean energy laboratory.” The partnership has attracted participation from Dell, GE Energy, IBM, Intel, and many others to work collectively on the challenges of transitioning to a clean energy economy, including smart grid deployment, utility business models, commercialization of university research, and more.^{xxii}

There are many sources of information on industry clusters in the Capital Area. The Austin Chamber of Commerce’s *Opportunity Austin* report presents data on their targeted industry clusters for the Austin-Round Rock-San Marcos MSA. Since the Capital Area encompasses ten counties instead of just the five-county MSA, two other industry cluster breakdowns are presented here using definitions from the Texas

Governor's Office^{xxiii} and the Purdue Center for Regional Development.^{xxiv} The Purdue cluster data comes from *Innovation in American Regions*, funded by the Economic Development Administration.^{xxv}

Industry Clusters Targeted by State of Texas in Capital Area

	Jobs 2010	Expected Growth 2010-2015	Establishments
Advanced Tech and Manufacturing	77,139	6,001	3,893
Aerospace and Defense	14,023	1,353	316
Biotechnology/Life Sciences	37,307	6,395	2,491
Info and Computer Technology	96,476	6,762	3,823
Petroleum and Chemical Products	6,522	-144	196
Energy	62,731	12,942	2,793

Source: EMSI. Definitions from Texas Governor's Office and Texas Workforce Commission.

Competitive Industry Clusters in Capital Area

	Establishments	Jobs	LQ
Information Technology & Telecommunications	3,654	90,596	2.39
Business & Financial Services	9,448	79,697	1.14
Energy (Fossil & Renewable)	3,559	56,332	1.17
Biomedical/Biotechnical (Life Sciences)	3,434	41,567	1.51
Printing & Publishing	1,340	18,465	1.20

Source: Texas Workforce Commission. Definitions from Purdue University as listed on the Innovation in American Regions website. LQ stands for location quotient and is a measure of industry concentration. Table lists clusters with LQ > 1 indicating greater concentration than U.S. average.

IV. CEDS Goals and Objectives

Goals

1. Develop a globally competitive workforce that encourages businesses to start, locate, and expand in the Capital Area

Objectives

- a. Conduct collaborative planning activities with regional partners to promote alignment of economic and workforce development goals, including advocacy emphasizing postsecondary education and skills training to support high-growth, high-wage jobs
 - b. Pursue funding opportunities with workforce partners to expand the availability of training programs for targeted industries and occupations
 - c. Make labor market information more accessible to school districts and higher education institutions so students can make informed choices about career options
2. Make the Capital Area the most entrepreneur-friendly region in the U.S.

Objectives

- a. Support programs that encourage people of all ages to consider becoming entrepreneurs
 - b. Ensure that entrepreneurs and small businesses have access to the resources they need to start and grow
 - c. Generate awareness about the economic impact of entrepreneurs on the regional economy
3. Enhance the Capital Area's economic competitiveness

Objectives

- a. Support the development of innovation-based industry clusters that create high-wage jobs
 - b. Help communities implement economic development strategies that grow existing, locally-owned businesses and attract new companies to the Capital Area
 - c. Encourage communities to adopt policies that create affordable housing options for people working in the community
 - d. Support the formation and growth of export-oriented businesses
4. Make the Capital Area a leader in the clean energy economy

Objectives

- a. Identify and promote economic development opportunities resulting from implementation of smart grid projects in the Capital Area
- b. Identify and promote regional assets that can be leveraged for development of the Capital Area's renewable energy and clean technology cluster
- c. Encourage communities to adopt energy efficiency policies for homes and businesses

V. Community and Private Sector Participation

The Capital Area CEDS was created under the direction of a broad-based committee that included representatives from government, higher education, workforce development, economic development, chambers of commerce, and the private sector. Business owners operating for-profit enterprises represented 52 percent of the committee's total membership. Geographically, business members of the committee represented five counties including urban and rural areas.

VI. Projects, Programs, and Activities

1. Publish an annual report that benchmarks the Capital Area against other U.S. regions to track economic development and evaluate the region's economic competitiveness
2. Provide venues for peer -to-peer learning about economic development for cities and counties, including Economic Development 101 workshops for elected officials
3. Publish reports for school districts that identify high-growth, high-wage job opportunities and relevant career and technical education that should be offered in the Capital Area^{xxvi}
4. Publish a "how-to guide" with Pecan Street Project that can help communities pursue their own smart grid projects that result in economic development opportunities^{xxvii}
5. Maintain an interactive asset map on the CAPCOG website that gives communities access to the latest available data on economic conditions in the region
6. Assist communities with funding applications to the Economic Development Administration
7. Assist communities with data needs related to economic development

Lead Organization

CAPCOG will serve as the lead organization for the projects listed in this plan. CAPCOG will work with regional partners, including chambers of commerce, workforce development boards, school districts, higher education institutions, and others, to implement these projects during 2010-2015.

Funding

In addition to the EDA planning grant and matching CAPCOG funds, these projects will be funded by a combination of workshop attendance fees, partnerships with local governments and other public agencies, and private sector donations or sponsorships where feasible and appropriate.

Job Creation

It's impossible to predict exactly how many jobs the CEDS will create. CAPCOG serves 10 counties, 70 cities, and approximately 25 economic development groups. CAPCOG's role is to provide data, strategy, and other types of assistance on economic development projects. CAPCOG work that results in jobs or private investment is recorded on the annual Government Performance and Results Act (GPRA) form submitted to EDA. Between 2005 and 2009, CAPCOG helped generate 699 jobs (created and retained), \$478.4 million in private investment, and \$20.8 million in public investment.

VII. CEDS Plan of Action

The Capital Area CEDS will be implemented in a way that aligns closely with other aspects of regional planning, including transportation, environmental protection, workforce development, broadband

deployment, and physical infrastructure development. As one of 24 regional planning councils in Texas, CAPCOG engages in air quality monitoring and improvement strategies, disbursement of funding for solid waste mitigation and recycling programs, oversight of Community Development Block Grants, and a wide range of other regional activities. CAPCOG's role as staff for the CAEDD provides critical synergy between the CEDS and the region's broader needs as a growing community.

The CEDS will support the State's economic development priorities through assistance provided to local governments in the Capital Area region. The State of Texas has identified six targeted industry clusters for development: advanced technologies and manufacturing, aerospace and defense, biotechnology and life sciences, information and computer technology, petroleum refining and chemical products, and energy. CAPCOG's assistance to communities in the region can include helping local officials identify opportunities for growing industries that correspond to the State's targeted clusters. CAPCOG can also serve as an intermediary for disseminating leads generated by state economic development staff and helping communities respond to opportunities where appropriate.

VIII. Performance Measures

CAEDD will use the following performance measures to evaluate its CEDS during 2010-2015:

- Number of jobs created or retained in the region
- Amount of private investment in the region
- Number of business formations and expansions in the region
- Number of people receiving job training in the region
- Number of students receiving information about careers in the region
- Number of people receiving training on economic development at CAPCOG workshops
- Number of requests for assistance completed for communities in the region
- Number of visitors to asset map and information clearinghouse on CAPCOG website
- Number of presentations on economic development given in the region

Annual progress on the CEDS performance measures will be reported on the GPRA form submitted to EDA as well as on the CAPCOG website.

XI. References

- ⁱ Texas State Data Center, U.S. Census Bureau
- ⁱⁱ U.S. Census Bureau
- ⁱⁱⁱ U.S. Census Bureau
- ^{iv} U.S. Census Bureau
- ^v U.S. Census Bureau
- ^{vi} Texas State Data Center
- ^{vii} EMSI
- ^{viii} EMSI
- ^{ix} EMSI
- ^x EMSI
- ^{xi} EMSI
- ^{xii} Texas Workforce Commission
- ^{xiii} For example, see *Forbes Best Places for Business and Careers* 2010 edition where Austin-Round Rock was ranked #10. http://www.forbes.com/2010/04/13/best-places-for-business-beltway-business-places-10_lander.html.
- ^{xiv} U.S. Census Bureau
- ^{xv} U.S. Census Bureau
- ^{xvi} <http://www.austinchamber.com/DoBusiness/AboutOpportunityAustin/About.html>
- ^{xvii} <http://www.utexas.edu/research/cshr/pubs/pdf/SFP.Brochure.pdf>
- ^{xviii} CAPCOG staffs the CAEDD and is responsible for implementing CEDS activities.
- ^{xix} <http://www.compete.org/publications/detail/33/asset-mapping-roadmap-a-guide-to-assessing-regional-development-resources>
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