

greater washington

2010 Regional Report

GREATER WASHINGTON  
**INITIATIVE**

Regional Economic Development

Washington, DC | Maryland | Virginia



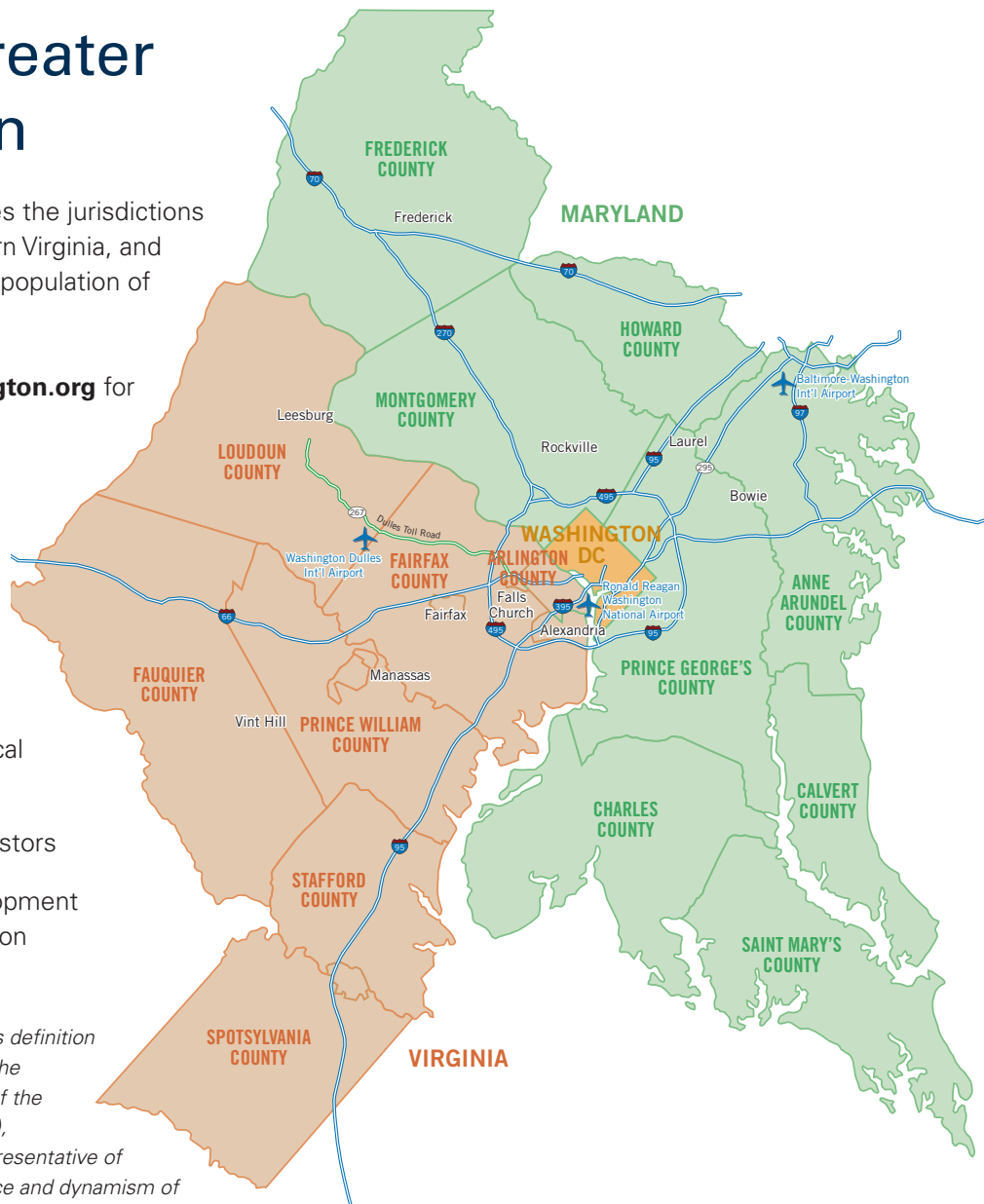
# defining greater washington

Greater Washington includes the jurisdictions of Washington, DC, Northern Virginia, and Suburban Maryland, with a population of 6.2 million people.

Visit [www.greaterwashington.org](http://www.greaterwashington.org) for information about:

- > confidential and complimentary services provided by the Greater Washington Initiative to companies and site location consultants
- > Greater Washington's local jurisdictions
- > GWI leadership and investors
- > links to economic development agencies across the region

*The Greater Washington Initiative's definition of the region differs slightly from the traditional government definition of the metropolitan statistical area (MSA), making it more expansive and representative of the true economic interdependence and dynamism of the region.*





# locate in greater washington

Greater Washington is without peer.

During challenging economic times, it becomes clear which regions in the US have prepared themselves to weather the storm, remain stable, continue to grow, and emerge stronger than ever.

Greater Washington's economy is diverse, and its workforce is the most-educated in the country. Combine that with unparalleled global connectivity and a strong business base anchored by the federal government, and you get a region that can support any company's needs.

Greater Washington is where business gets done. And the Greater Washington Initiative is your resource for comprehensive regional information to assist you in making an informed decision about locating or expanding your business in Greater Washington.

We invite you to join us. Greater Washington companies prosper, and we want yours to be one of them.

Hon. James W. Dyke, Jr.  
*Chairman, Greater Washington Initiative  
and Greater Washington Board of Trade  
Partner, McGuireWoods LLP*

Matt S. Erskine  
*Executive Director, Greater Washington Initiative*

## contents

### **greater washington at-a-glance . . . . . 2**

- economic strength & stability . . . . . 4
- knowledge production  
& attraction . . . . . 6
- education assets . . . . . 8
- workforce diversity . . . . . 9
- economic diversity. . . . . 10
- serious about business . . . . . 11

### INDUSTRY SPOTLIGHT

- aerospace, defense, security  
& intelligence . . . . . 12
- biotechnology & life sciences . . . . . 14
- information & communication  
technology . . . . . 16
- energy efficiency & sustainability . . . . . 18
- innovation & entrepreneurship . . . . . 20
- international business . . . . . 21
- global connectivity. . . . . 22
- federal government foundation . . . . . 24
- infrastructure investment . . . . . 25
- quality of place & culture. . . . . 26
- gwi leadership . . . . . 28
- gwi investors . . . . . 30
- local economic  
development offices . . . . . 32
- about gwi. . . . . inside back cover

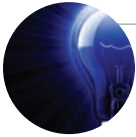




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### **serious about business (p. 11)**

- Home to 18 *Fortune* 500® company headquarters representing \$308 billion in annual revenues
- 5 major corporate HQ relocations to Greater Washington in last 2 years
- Strong in Aerospace, Defense, Security, and Intelligence; Information and Communication Technology; Biotechnology and Life Sciences; Healthcare; and Hospitality



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### **innovation & entrepreneurship (p. 20)**

- 48 *Inc.* 500 fastest-growing companies — #1 region in US for 13 consecutive years
- \$541 million of venture capital invested in regional companies in 2009
- Research & development expenditures among local universities and colleges exceeded \$3.5 billion in 2008



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### **international business (p. 21)**

- Home to more than 1,000 foreign-owned companies, representing more than 50 countries
- #1 US city and #2 global city for real estate investment
- 1.23 million people in the region speak at least one other language in addition to English



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### **global connectivity (p. 22)**

- More than 580 weekly international non-stop flights serviced nearly 62 million passengers in 2009
- Service to more than 40 world cities connects region to 80% of world's economy
- The region's three airports have best on-time arrival performance on East Coast (above 80%)



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### **federal government foundation (p. 24)**

- #1 in US in federal procurement — more than Texas or California
- Federal procurement of goods and services in Greater Washington = \$75.6 billion in FY 2009
- Overall federal spending in Greater Washington (including salaries & entitlements) reached \$166 billion in 2008



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### **quality of place & culture (p. 26)**

- 234,000 acres of parkland and more than 800 miles of bikeways — more per capita than Chicago, Los Angeles, New York, and San Francisco
- More than 80 theatre companies; 6 major league sports teams; 15 Smithsonian Museums
- Highest median household income in US — \$85,824
- 66th in world in cost of living
- Annual healthcare cost per employee among lowest of any major metro region



## economic strength & stability

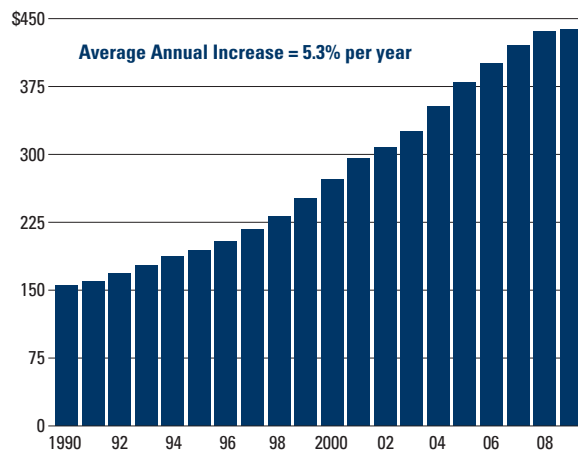
Despite the marked volatility of recent years, Greater Washington has remained one of the best-performing economies in the US and is poised to prosper in the years ahead. Unlike many of its peer regions throughout the US, Greater Washington is already positioned for the 21st century global economy.

Greater Washington is one of the most dynamic economies in the US. While many regional economies find it difficult to maintain steady growth, particularly during recessionary times, Greater Washington's economy has grown steadily for the last 20 years, as measured by Gross Regional Product, with a compounded annual growth rate of 5.3 percent.

Greater Washington's economy has enjoyed robust growth over the past two decades and now boasts the second-highest Gross Regional Product per capita in the US. The region is firmly established as the fifth-largest regional economy in the US, with a 2009 Gross Regional Product of \$443 billion.

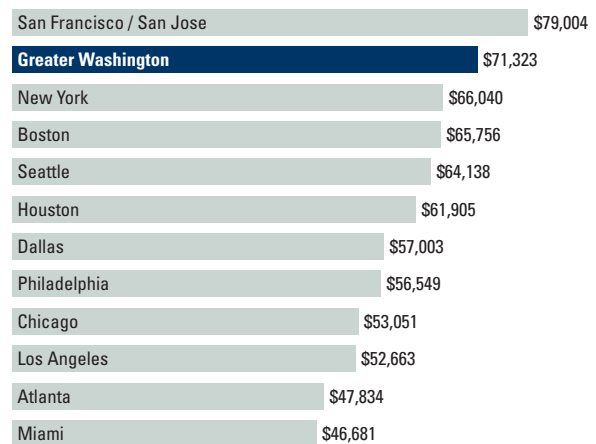
According to a 2010 "State of Metropolitan America" report by the Metropolitan Policy Program at Brookings, Greater Washington is the *only* metropolitan area east of the Mississippi River designated as a "Next Frontier" region, exceeding national averages on population growth, diversity, and educational attainment.

Greater Washington Gross Regional Product, 1990–2009 (in billions)



SOURCE: Woods & Poole

Gross Regional Product per Capita, 2009



SOURCE: Woods & Poole

**Three of the top seven and 16 of the top 50 counties in the US with the highest concentration of the “young and wealthy” are in the Greater Washington region. “Perhaps it’s the mix of power and possibility, but [Greater] Washington, DC is increasingly drawing in the ‘young and wealthy’... Over the last two decades, the DC area has surged in popularity with the young and moneyed,” according to Nielsen Claritas.**

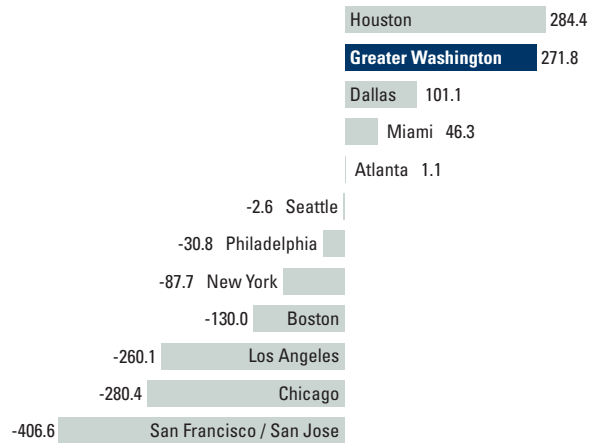
Since 2000, many major US regions have lost hundreds of thousands of jobs. During this same period, Greater Washington added more than 270,000 workers to its payrolls — the second-greatest number of any metropolitan region in the country.

Greater Washington’s resiliency is further reflected in unemployment rate comparisons. The national unemployment rate as of March 2010 stood at 9.7 percent. In contrast, Greater Washington’s unemployment rate remains below 7 percent.

Historically, Greater Washington’s unemployment rate has been at least two percentage points below the national average. In recent years, the gap between Greater Washington, its peer metropolitan regions, and the US overall has become more pronounced. For example, in 2005, the unemployment rate difference between the region with the highest rate (Los Angeles at 5.1 percent) and the lowest (Greater Washington at 3.2 percent) was 1.9 percent. In March 2010, Los Angeles’ unemployment rate reached nearly 12 percent while Greater Washington’s remained below 7 percent — a difference of 5 percent.

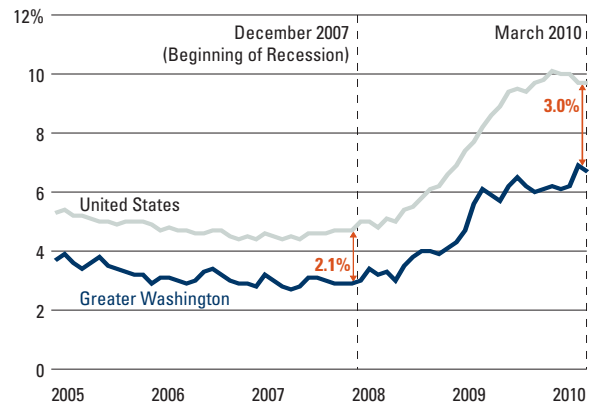
The bottom line: company decision makers want to be in a region that is growing, stable, and strong. Greater Washington is a region without peer — creating capability and capacity, focusing on high-value-add jobs, and providing an environment ideal for growing business.

**Job Growth, 2000–2009 (in thousands of jobs)**



SOURCE: Bureau of Labor Statistics

**Unemployment Rate, 2005–2010**



SOURCE: Bureau of Labor Statistics



# knowledge production & attraction

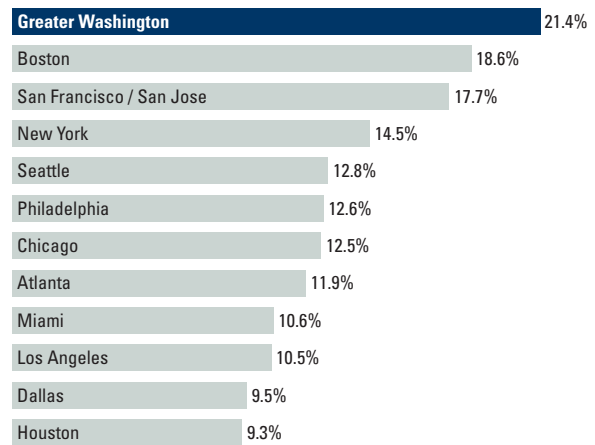
Greater Washington’s strong economy, international composition, diverse professions, and excellent academic institutions have produced the best-educated workforce in the nation. Twenty-one percent of the region’s workforce has a graduate or professional degree and 47 percent has a bachelor’s degree. This ranks Greater Washington No. 1 among the top ten major metropolitan areas in the nation.

Greater Washington possesses an unparalleled knowledge ecosystem — a place where knowledge is valued, supported, and networked. Much of the region’s growth has come from talented workers drawn to “America’s Human Capital.”

Every local jurisdiction within the Greater Washington region shares the highly-educated workforce, providing companies with a diverse range of location options that is unrivaled anywhere in the US. According to the US Census Bureau, the Greater Washington region is home to six of the top ten counties in the nation with the highest percentage per capita of college degrees.

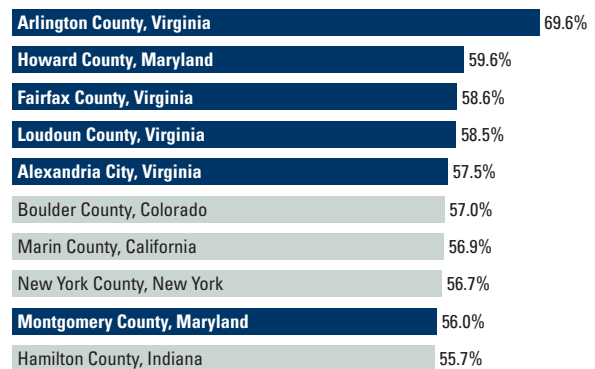
Arlington County, Virginia is the most-educated county in the US, with nearly 70 percent of its residents over the age of 25 having a college degree.

## Percent of Population Age 25+ with Graduate or Professional Degree



SOURCE: US Census Bureau

## Ten Most Educated Counties in the US, 2008 Percent of Population 25+ with Bachelor’s Degree or Higher



SOURCE: US Census Bureau

**Greater Washington's universities and colleges awarded nearly 12 degrees for every 1,000 residents in 2008 — more than New York, Chicago, San Francisco / San Jose and Philadelphia.**

Greater Washington has the workforce that is tackling the issues of tomorrow ... today. The occupational makeup of Greater Washington's workforce puts it first in US in the percentage in Business and Finance; Computer and Math Science; Life, Physical, and Social Science; and Legal Occupations. Greater Washington ranks second in the percentage of Arts, Design, Entertainment, Sports, and Media Occupations.

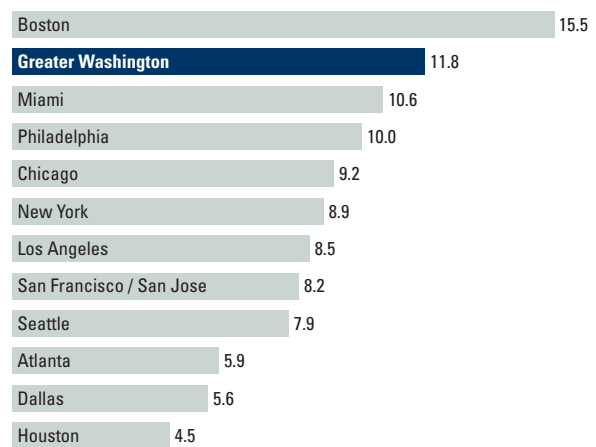
Greater Washington's knowledge production is not only impressive in scale but also in breadth — all of the world's most innovative disciplines are represented by universities in the region. Georgetown University and the University of Maryland, for example, both feature nationally ranked graduate business programs. Both The George Washington University and George Mason University boast nationally ranked engineering departments. In addition, Greater Washington is home to five nationally renowned law schools — American University, George Mason University, Georgetown University, The George Washington University, and the University of Maryland.

**Greater Washington Rank in US by Occupation, 2008**  
(as % of region's workforce)

Occupation	Rank*
Business and Financial	1
Computer and Mathematical Occupations	1
Life, Physical, and Social Science Occupations	1
Legal Occupations	1
Arts, Design, Entertainment, Sports, and Media Occupations	2
Management	3

\*Among Metropolitan Areas with 1 million + workers  
SOURCE: Bureau of Labor Statistics

**University Degrees Awarded, 2008 (per 1,000 residents)**



SOURCE: National Center for Education Statistics



## education assets

Home to some of the world’s most prestigious colleges and universities, Greater Washington has a demonstrated capacity to promote tomorrow’s workforce for today’s companies. Greater Washington had more than 264,000 full-time undergraduate students and produced 73,000 university graduates in 2008 alone.

Business Administration is the most heavily represented course of study among Greater Washington’s university graduates, supporting the growing need for Professional and Business Services employees — the region’s strongest and fastest-growing industry.

In an analysis of 360 metropolitan regions, the American Institute for Economic Research’s College Destination Index (CDI) ranked Greater Washington the nation’s fourth-best metropolitan area for attending college, outranking New York and San Francisco in the number of college students per capita (81 students for every 1,000 residents).

In addition to providing highly-skilled graduates for the region’s workforce, Greater Washington’s educational institutions ensure that the region continues to grow and prosper through contributions in research and development, workforce training, and investment in innovation infrastructure.

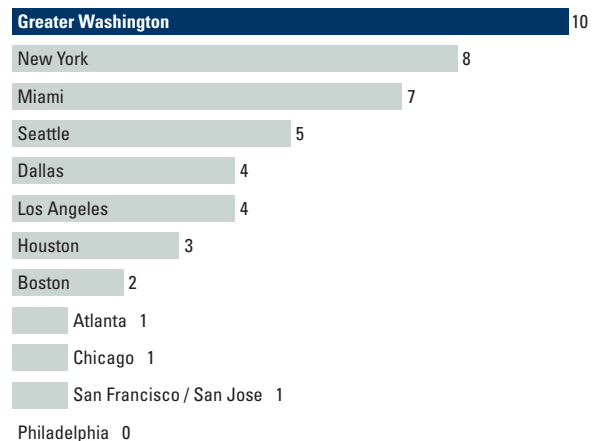
Greater Washington also boasts some of the best high schools in the US. According to *Newsweek’s* “America’s Best High Schools,” Greater Washington has ten — more than any other major metropolitan area in the country.

**Most Popular College Degrees Among Greater Washington University Graduates, 2008**

Diploma	2008 Graduates
Business Administration and Management, General	8,220
International Relations and Affairs	2,198
Psychology, General	2,035
Accounting	1,656
Political Science and Government, General	1,503
Biology/Biological Sciences, General	1,230
Medical/Clinical Assistant	1,138
English Language and Literature, General	1,129
Finance, General	1,055
Interdisciplinary Studies	982

SOURCE: National Center for Education Statistics

**Number of Schools Ranked in the Top 100 of *Newsweek’s* “America’s Best High Schools,” 2009**



SOURCE: *Newsweek*

**Forbes “Top-Earning States for Women” puts Washington, DC at the top of the list, where women make an average of \$866 a week. On average, Washington, DC women earn 92.2 percent as much as their male colleagues, versus the US average of 80 percent.**

## workforce diversity

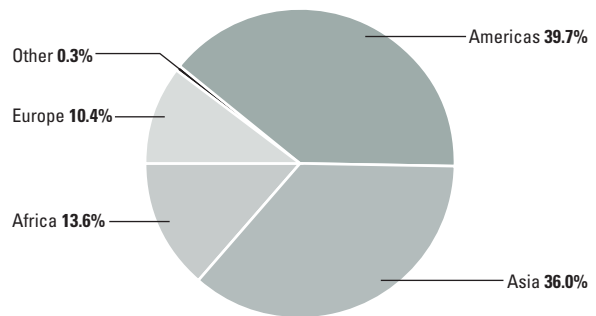
Greater Washington provides access to the best and brightest minds in the nation, including a growing number from around the world. The foreign-born population of Greater Washington accounts for 20.3 percent of the total population of the region. The 258,000 new foreign-born residents represent 59.5 percent of net population growth in Greater Washington since 2000.

As a testament to our region’s welcoming and attracting global talent, the foreign-born population in Greater Washington has been increasing at a faster rate than the national rate. From 2000 to 2008, the number of foreign-born in Greater Washington increased by 33 percent versus 22 percent for the US as a whole.

Among the major metropolitan regions in the US, Greater Washington’s foreign-born workforce is the most educated. In 2008, nearly 42 percent had a bachelor’s degree and nearly 20 percent had a graduate or professional degree.

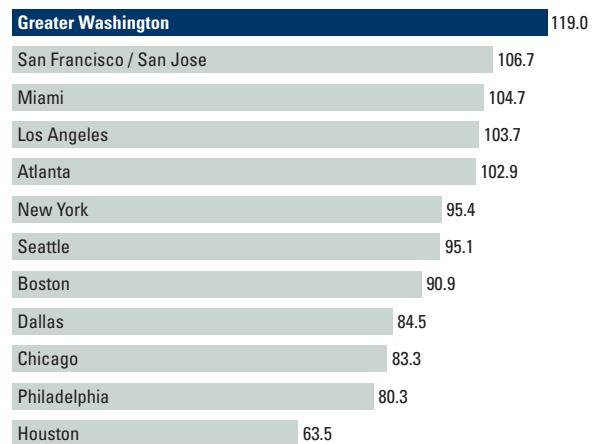
Forty-five percent of women in Greater Washington aged 25 or older have a bachelor’s or advanced degree, fully 18.2 percent higher than the national average of 26.7 percent, ranking the region first in the nation. High educational attainment for women in Greater Washington means they are poised to take on the region’s top jobs. Greater Washington is No. 1 among major metropolitan regions for female executives — for every 100,000 female workers in the region, 1,213 are in executive or managerial positions. This is 56 percent higher than the overall national average.

**Origin of Foreign-Born Population in Greater Washington**



SOURCE: US Census Bureau

**Female Executives, 2008 (per 10,000 female workers)**



SOURCE: US Census Bureau



## economic diversity

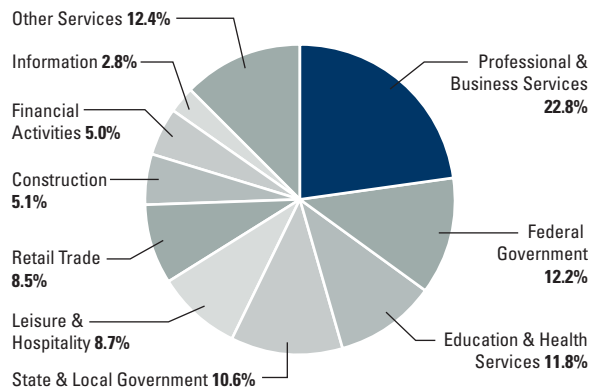
Greater Washington's economy is increasingly diverse and represents the model for regions in the 21st century global economy. With the federal government as a stable foundation, the region has responded to economic changes and positioned itself as the leading global region through a compelling combination of Business and Professional Services, Technology, human capital, and thought leadership.

Forty years ago, approximately one-third of Greater Washington's workforce was employed by the federal government. Over the last three decades, with the growth of the Professional and Business Services and Technology sectors, that share has declined to approximately 12 percent.

The majority of Greater Washington's jobs — nearly 23 percent — continues to be in Professional and Business Services, representing nearly one quarter of Greater Washington's gross regional product. In fact, Greater Washington ranks No. 1 in the US for Professional and Business Services job growth from 2000 to 2009 — nearly 118,000 jobs in this sector, more than the next three regions combined.

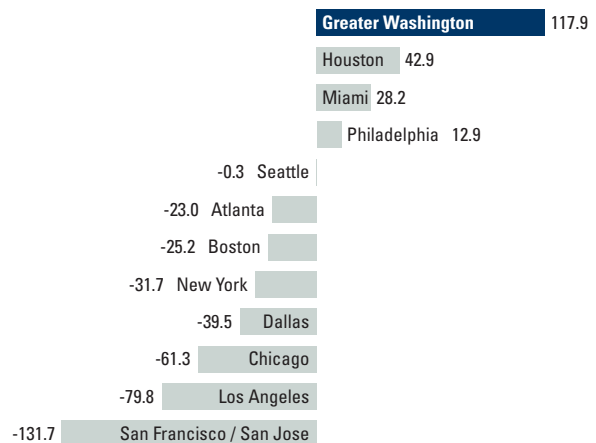
Greater Washington has seen an increase in Financial Services (1.4 percent), and Healthcare and Education (26.1 percent). The region has also emerged as a hub for the Hospitality industry, luring the corporate headquarters of Hilton Worldwide in 2009. Of the 6.5 million hotel rooms operated by the largest hotel companies in the world, 25 percent (1.6 million) are managed by companies headquartered in Greater Washington.

Greater Washington Jobs by Sector, 2009



SOURCE: Bureau of Labor Statistics

Growth in Business and Professional Services Jobs, 2000–2009 (in thousands of jobs)



SOURCE: Bureau of Labor Statistics

***“Greater Washington is a more sensible place to run a global business. We were drawn to a strong workforce in the area, particularly the real estate and hospitality talent. We wanted to be in an area that enables us to recruit and retain exceptional team members, and that’s easier to accomplish in Greater Washington.”***

Christopher J. Nassetta, President & CEO, Hilton Worldwide

## serious about business

Private sector companies find Greater Washington’s business climate welcoming and accommodating. The Greater Washington region is home to 18 *Fortune* 500® company headquarters, which earned combined annual revenues of more than \$308 billion in 2009.

The list of Greater Washington’s top employers represents a cross-section of today’s most exciting and innovative industries, such as Aerospace, Defense, Security, and Intelligence; Information and Communication Technology; Biotechnology and Life Sciences; Healthcare; and Hospitality.

Over the last decade, Greater Washington has established itself as a center for corporate headquarters. Corporate headquarters relocations occur infrequently, and when they do, Greater Washington has been the overwhelming winner.

Between 2000 and 2009, just 27 domestic and foreign-owned firms relocated a corporate headquarters to a new metropolitan area. Fourteen occurred in the last two years alone, five of which (more than one-third) relocated to Greater Washington — CSC, Volkswagen Group of America, Hilton Worldwide, SAIC, and Northrop Grumman.

In a 2010 survey of company CEOs, Greater Washington’s executives reported by a wide margin of 66-to-17 percent that they believe it is easier to do business here than in most other places in the US.

### Fortune 500 Companies Headquartered in Greater Washington, 2009

Company	Fortune 500 Rank	Revenues (millions)	City
Lockheed Martin	44	\$45,189	Bethesda, MD
Freddie Mac	54	\$37,614	McLean, VA
Northrop Grumman	61	\$35,300	Northern Virginia
General Dynamics	69	\$31,981	Falls Church, VA
Fannie Mae	81	\$29,065	Washington, DC
Computer Sciences Corporation	138	\$16,740	Falls Church, VA
Capital One Financial	144	\$15,980	McLean, VA
AES	156	\$14,690	Arlington, VA
Coventry Health Care	168	\$13,993	Bethesda, MD
Danaher	207	\$11,185	Washington, DC
Marriott International	213	\$10,908	Bethesda, MD
SAIC	215	\$10,847	McLean, VA
Pepco Holdings	251	\$9,259	Washington, DC
SLM	354	\$6,145	Reston, VA
Gannett	370	\$5,613	McLean, VA
The Washington Post Co.	455	\$4,570	Washington, DC
NII Holdings	468	\$4,398	Reston, VA
Host Hotels & Resorts	492	\$4,216	Bethesda, MD

SOURCE: *Fortune*

### Major Employers in Greater Washington

Major Employers	Metro-Area Employees
Lockheed Martin	23,000
Northrop Grumman	20,700
SAIC	17,500
Verizon Communications	16,100
Inova Health System	15,632
Marriott International	14,283
Booz Allen Hamilton	14,000
MedStar Health	13,608
Computer Sciences Corporation	7,304
General Dynamics	7,015
Adventist HealthCare	6,900
BAE Systems	6,762
AT&T	6,150
CACI International	5,965
Deloitte LLP	5,099

SOURCE: *Washington Business Journal Book of Lists, 2010*



INDUSTRY SPOTLIGHT:

# aerospace, defense, security & intelligence

Greater Washington features one of the world’s most significant and competitive Aerospace, Defense, Security, and Intelligence clusters. An historic stalwart of the Greater Washington economy, this industry continues to fuel regional employment growth.

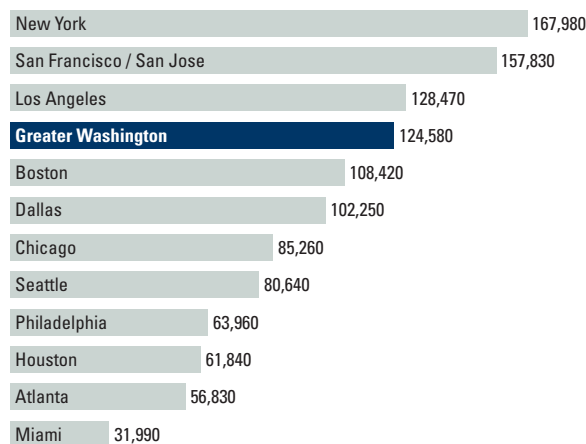
The Aerospace and Defense industry is propelled by human capital, including computer software analysts, engineers, and technicians. Greater Washington has nearly 125,000 workers in Aerospace, Defense, and Engineering-related occupations, the fourth highest number among the country’s largest metropolitan areas.

In 2008, the leading occupations in the region’s Aerospace, Defense, Security, and Intelligence industry included computer software engineers, computer systems analysts, and mechanical engineers. Approximately 2,500 aerospace engineers work in Greater Washington — the second highest concentration of such workers in the US.

With the recent corporate headquarters relocations of SAIC and Northrop Grumman to Greater Washington, the region is now home to the top five Aerospace, Defense, Security, and Intelligence companies in the US.

Greater Washington is also home to the world’s leading Aerospace and Defense policymakers and thought leaders.

**Aerospace & Defense Human Capital, 2008**  
**Total Number of People Employed in Aerospace and Related Occupations**



SOURCE: Bureau of Labor Statistics

**Greater Washington’s Aerospace & Defense Human Capital, 2008**

Occupation	Employment
Computer software engineers (Applications)	31,050
Computer software engineers (Systems software)	28,790
Computer systems analysts	28,030
Engineering managers	6,100
Electrical engineers	5,930
Mechanical engineers	5,430
Electronics engineers (Except computer)	4,760
Electrical and electronic engineering technicians	4,110
Industrial engineers	3,840
Aerospace engineers	2,500
Electrical and electronic equipment assemblers	1,830
Aircraft mechanics and service technicians	1,350
Other	860
<b>Total Aerospace &amp; Defense Employment</b>	<b>124,580</b>

SOURCE: Bureau of Labor Statistics

***“SAIC recently relocated its corporate headquarters to the Greater Washington area because this is where our federal government customers are and because the area has the highly educated, highly diverse workforce of scientists, engineers and technology professionals we need to grow our business.”***

Walt Havenstein, Chief Executive Officer, Science Applications International Corporation (SAIC)

Greater Washington benefits enormously from the spending related to one of the largest concentrations of federal research facilities in the region. In 2005, for example, the Departments of Defense and Homeland Security’s combined research expenditures in Maryland, Virginia, and the District of Columbia totaled \$11.8 billion.

More than 30 facilities conduct aerospace- and defense-related research in the region. Facilities range from the Johns Hopkins University Applied Physics Research Lab in Howard County, Maryland to the National Transportation Safety Board Training Center in Virginia.

The Department of Homeland Security recently completed its Master Plan to consolidate its Headquarters Campus at St. Elizabeths in the District of Columbia, creating direct employment opportunities for more than 32,000 people in the region (in addition to the 14,000 federal employees who will work there).

In 2008, aerospace and defense exports in Greater Washington topped \$1.2 billion — an increase of nearly 75 percent during the previous five years. European countries are among the largest recipients of Greater Washington’s aerospace exports.

**Top 10 Government Contractors in Greater Washington**

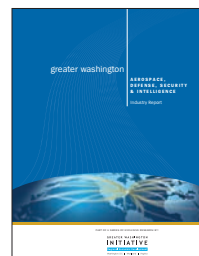
Contractor	Metro-Area Employees
Lockheed Martin	23,000
Northrop Grumman	21,100
SAIC	16,500
Booz Allen Hamilton	14,000
Computer Sciences Corporation	10,500
General Dynamics	7,015
BAE Systems	6,700
CACI International	5,965
IBM	5,400
SRA International	4,619

SOURCE: *Washington Business Journal Book of Lists*, 2010

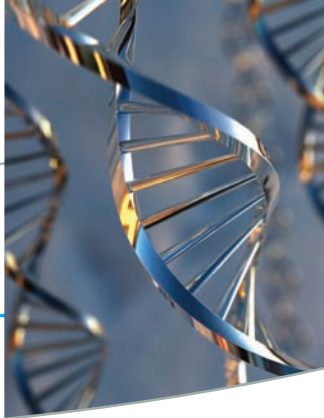
**Greater Washington Aerospace & Defense Products & Parts Exports, 2008 (in millions)**

Country	Exports
United Kingdom	\$292.7
Germany	\$184.3
France	\$182.8
Netherlands	\$70.8
Brazil	\$70.6
Italy	\$65.3
Switzerland	\$55.2
Belgium	\$48.6
Ethiopia	\$44.4
Denmark	\$34.1

SOURCE: US Census Bureau



Download the full *Aerospace, Defense, Security & Intelligence Industry Report* at [www.greaterwashington.org](http://www.greaterwashington.org)



INDUSTRY SPOTLIGHT:

# biotechnology & life sciences

The Biotechnology and Life Sciences sector plays a critical role in extending and improving the lives of millions of individuals worldwide. Greater Washington is uniquely positioned and distinctly advantaged for supporting growth in this crucial sector, today and into the future.

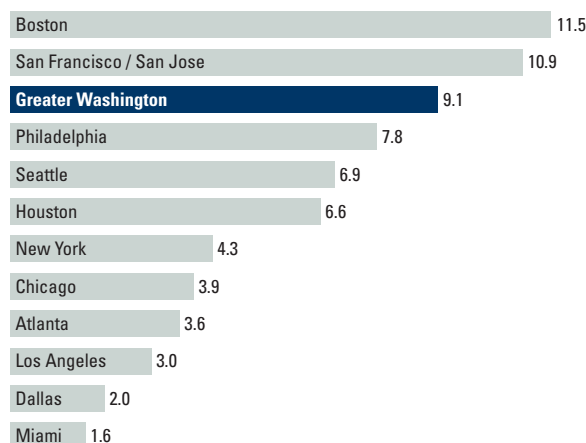
The region possesses a workforce with a proven capacity in Biotechnology and Life Sciences. This industry employs more than 37,500 workers in Greater Washington. Per capita, this represents the fourth largest Biotechnology and Life Sciences workforce in the US.

Among the country's largest metropolitan regions, Greater Washington features the third-highest concentration of life and physical scientists, including microbiologists, biological technicians, and epidemiologists. In 2008, Greater Washington featured 9.1 life and physical scientists for every 1,000 workers.

From multinationals to nascent startups, Biotechnology and Life Sciences firms enjoy unparalleled access to one of the world's richest pools of specialized talent in Greater Washington. It is therefore no surprise that the region is home to the world's most innovative Biotechnology and Life Sciences companies. The region is an established leader in research fields such as oncology, infectious diseases, and drug delivery.

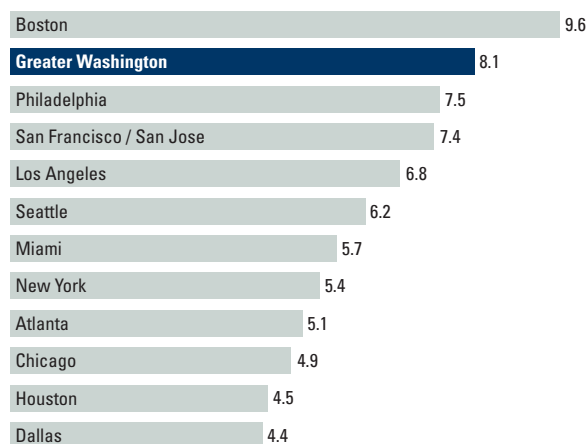
Venture capital helped create the biotechnology industry, and today, such funding continues to play a pivotal role in supporting the broader life sciences sector.

**Biotechnology & Life Sciences Human Capital, 2008**  
Life and Physical Scientists per 1,000 Workers



SOURCE: US Census Bureau

**Biotechnology & Life Sciences Graduates, 2008**  
Biological and Biomedical Sciences Degrees Awarded (per 10,000 workers)



SOURCE: National Center for Education Statistics

**Greater Washington graduates the second-most biological and biomedical science degrees per capita in the US.**

With the country's fifth largest Biotechnology and Life Sciences venture capital market, Greater Washington provides an ideal environment for ambitious companies with compelling technologies. In 2009 alone, investors poured nearly \$100 million into Greater Washington biotechnology firms.

Entrepreneurship is crucial in transforming discoveries made in university laboratories into life-saving Biotechnology and Life Sciences therapies. Two federal programs — Small Business Innovation Research awards (SBIR) and Small Business Technology Transfer awards (STTR) — are specifically designed to help fund small businesses engaged in promising research and development projects. In 2008, these two programs provided Greater Washington Biotechnology and Life Sciences firms with more than \$28 million in funding.

Greater Washington continues to be the nation's premier center for cancer research. The National Cancer Institute is planning to build its consolidated headquarters in Montgomery County as part of the Shady Grove Life Sciences Center. The \$200 million, 2,100-employee development will consist of a 575,000 square-foot complex devoted to education and research and development (private, academic, and federal).

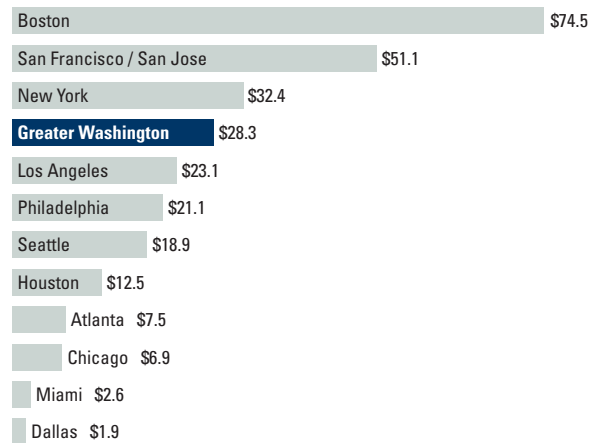
The Frederick County, Maryland Office of Economic Development was recently given the Top Award of Excellence in the field of Biotechnology recruitment, retaining and assistance by *Expansion Solutions Magazine*.

**Top 10 Bioscience Companies in Greater Washington**

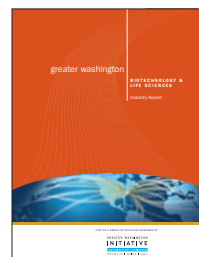
Bioscience Firm	Metro-Area Employees
MedImmune LLC	1,500
Human Genome Sciences Inc.	880
Qiagen NV	600
J. Craig Venter Institute	340
Fisher Bioservices	253
Life Technologies Corp.	250
United BioSource Corp.	210
Wellstat Therapeutics Corp.	178
Emergent BioSolutions Inc.	141
MacroGenics Inc.	115

SOURCE: *Washington Business Journal Book of Lists, 2010*

**Biotechnology & Life Sciences Small Business Innovation, 2008 National Institutes of Health Small Business Innovation Research (SBIR) & Small Business Technology Transfer (STTR) Awards (in millions)**



SOURCE: National Institutes of Health



Download the full *Biotechnology & Life Sciences Industry Report* at [www.greaterwashington.org](http://www.greaterwashington.org)



INDUSTRY SPOTLIGHT:

# information & communication technology

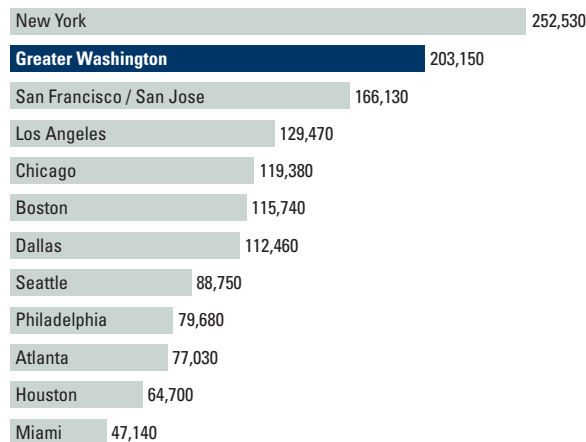
Armed with a proven track record of innovation in the area of Information and Communication Technology (ICT), Greater Washington remains the leading metropolitan area for this industry. Greater Washington's Information and Communication Technology workforce is second only to New York, with more than 200,000 workers in science and mathematical occupations.

In 2008, the leading occupations in the region's ICT industry included computer software engineers, computer systems analysts, network and computer systems administrators, and computer support specialists.

Greater Washington's top ten university computer science programs, ranked by enrollment, served approximately 20,600 students in 2009. This number is up from just 8,000 in 2005, representing a 158 percent increase in students in just four years.

Major Information Technology firms headquartered in Greater Washington, such as SAIC, solidify the region as an information technology hub. In fact, the largest aggregation of telecommunications providers in North America is located near the Dulles corridor in Virginia. As a result, 80 percent of Internet traffic in the US runs through Greater Washington.

**Information & Communication Technology Human Capital, 2008  
Science & Mathematical Occupations**



SOURCE: Bureau of Labor Statistics

**Greater Washington's Information & Communication Technology  
Human Capital, 2008  
Science & Mathematical Occupations**

Occupation	Employment
Computer Systems Analysts	33,600
Computer Software Engineers, Applications	31,050
Computer Software Engineers, Systems Software	28,790
Network and Computer Systems Administrators	21,450
Computer Specialists (Other)	19,470
Computer Support Specialists	19,010
Network Systems and Data Communications Analysts	16,110
Computer Programmers	14,670
Database Administrators	6,220
Operations Research Analysts	5,300
Statisticians	3,500
Computer and Information Scientists (Research)	2,990
Other	990
<b>Total</b>	<b>203,150</b>

SOURCE: Bureau of Labor Statistics

**Greater Washington “is the North American leader among high-tech services. As a telecommunications hub and a large Internet presence, it has gained an important competitive advantage by creating economies of scale due to high local demand.”**

Milken Institute’s *North America’s High Tech Economy* report, 2009

Similar to many growing industries across the US, Information and Communication Technology companies are innovative and frequently begin as small- to medium-sized startups. Greater Washington has proven to be fertile ground for venture capital funding in such areas as software, IT services, and networking and equipment. In 2009, venture capital firms invested nearly \$200 million into ICT companies.

With ample funding and a culture of entrepreneurship and innovation, Greater Washington’s ICT companies thrive. Of the 48 *Inc.* 500 fastest-growing companies in the US that are headquartered in Greater Washington, ten of them are in IT services, software, and telecommunications.

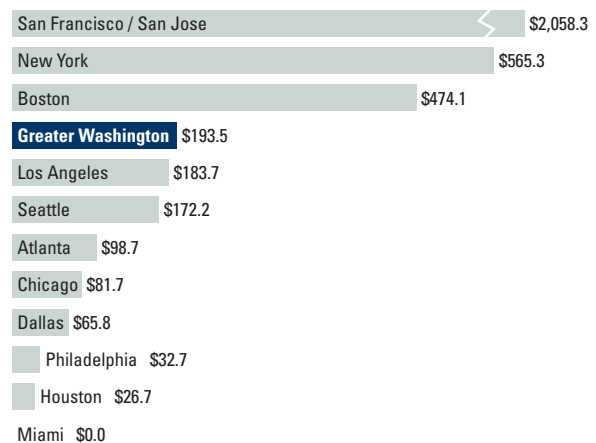
Once ICT companies establish themselves in Greater Washington, they have an unmatched array of support networks to help them achieve success, including three major technology associations: Northern Virginia Technology Council, Tech Council of Maryland, and the Washington DC Technology Council.

**Top 10 IT Employers in Greater Washington**

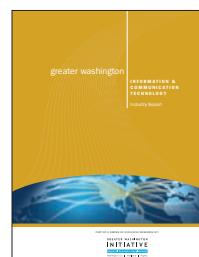
IT Firm	Metro-Area Employees
SAIC	14,500
Lockheed Martin	13,000
Booz Allen Hamilton	8,510
Computer Sciences Corporation	7,304
IBM	4,800
Northrop Grumman	4,800
General Dynamics	4,400
BAE Systems	4,370
CACI International	2,961
SRA International	2,341

SOURCE: *Washington Business Journal Book of Lists*, 2010

**Venture Capital Funding, 2009  
Telecommunications, Software, IT Services, and Networking & Equipment Venture Capital Funding (in millions)**



SOURCE: PricewaterhouseCoopers



*Information & Communication Technology Industry Report* available 4th quarter 2010.



INDUSTRY SPOTLIGHT:

# energy efficiency & sustainability

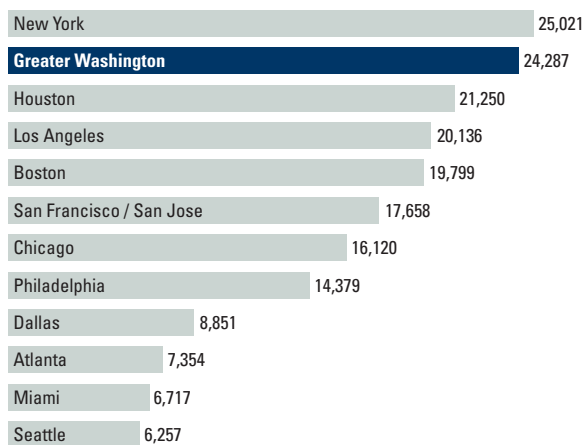
While regions throughout the world are quick to proclaim their commitment to Energy Efficiency and Sustainability, few areas compare to Greater Washington. Greater Washington's leadership and comprehensive integration across a portfolio of assets — human capital, research and development, thought leadership, private enterprise, green expenditures, and a culture of sustainability — will drive business success in this industry unlike anywhere else.

According to an analysis published by the US Conference of Mayors and IHS Global Insight, Greater Washington features the country's second-highest number of jobs in Energy Efficiency and Sustainability. The report also projects that the Greater Washington region will generate the second-greatest number of potential green jobs over the next three decades.

In addition, Greater Washington features the highest number of environmental professionals of any metropolitan area in the US, providing businesses in the region with an unmatched pool of conservationists, environmental scientists, biologists, and environmental engineers.

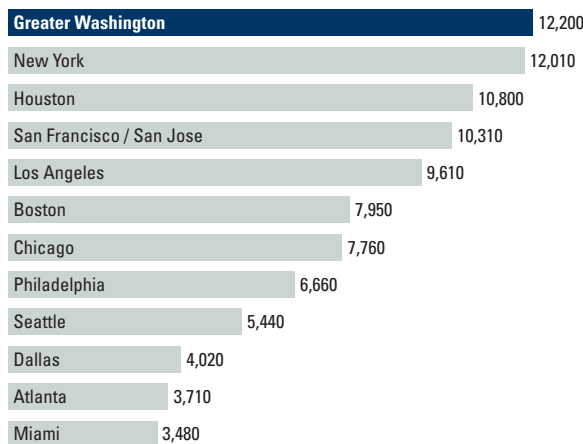
As home to the nation's capital, Greater Washington will benefit disproportionately from investments to increase the energy efficiency of federal buildings. Of the \$5.5 billion allocated in the American Recovery and Reinvestment Act of 2009 to improve the energy efficiency of federal buildings, Greater Washington is expected to receive \$1.2 billion — nearly one quarter of the national total.

### Energy Efficiency & Sustainability Employment, 2008



SOURCE: US Conference of Mayors

### Environmental Science Employment, 2008



SOURCE: Bureau of Labor Statistics

***“As demonstrated by the hundreds of millions of dollars we have invested in bringing innovative energy technology to the region, Pepco is committed to ensuring Greater Washington is a leader in energy efficiency and sustainability.”***

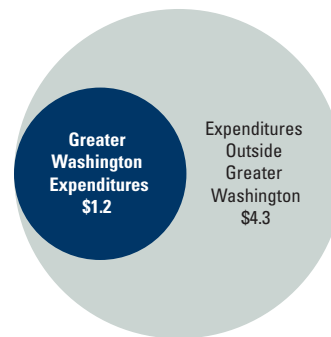
Joe Rigby, Chairman of the Board, President & CEO, Pepco Holdings, Inc.

Per capita, Greater Washington features the second-greatest number of Leadership in Energy and Environmental Design (LEED) registered and certified projects among the largest US metropolitan areas. Continued federal investment will create thousands of jobs and ensure the competitiveness of Greater Washington’s Energy Efficiency workforce, while helping to maintain Greater Washington’s position as one of the most sustainably built regions in the country.

Venture capital is the lifeblood for companies in emerging sectors such as Energy Efficiency and Sustainability. With the country’s third largest Energy Efficiency and Sustainability venture capital market, Greater Washington provides an ideal environment for ambitious companies looking to change the world. In 2008 alone, investors poured nearly \$190 million in local companies active in all segments of the Energy Efficiency and Sustainability industry, from biotechnology processes for pollution and toxic waste control to alternative energy sources to energy conservation technologies.

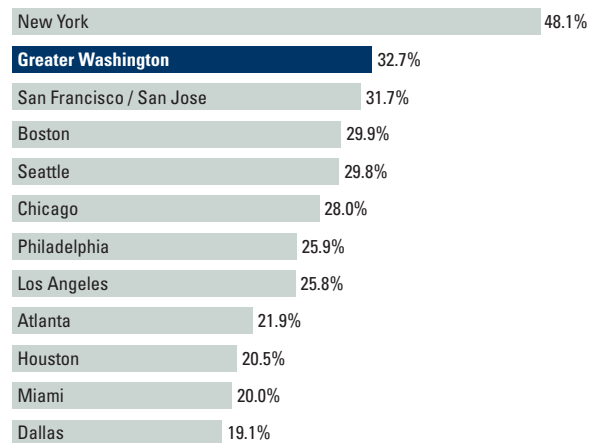
As illustrated by Greater Washington’s multimodal transportation system, energy efficient skyline, and thriving local food market, sustainability is a part of the region’s fabric. Greater Washington features the second-highest rate of sustainable commuting among the country’s largest metropolitan regions. More than 32 percent of residents in Greater Washington participate in carpools, take public transit, telecommute, bike, or walk to work.

**Federal Energy Efficiency Expenditures (in billions)**

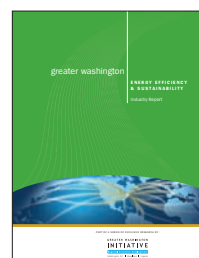


SOURCE: *Washington Business Journal*, 2009

**Sustainable Commuting, 2008**  
**Percentage of Workforce that Carpools, Takes Public Transit, Bikes, Walks to Work, or Works from Home**



SOURCE: US Census Bureau



Download the full  
*Energy Efficiency &  
 Sustainability Industry Report*  
 at [www.greaterwashington.org](http://www.greaterwashington.org)



## innovation & entrepreneurship

In addition to its share of large companies and major corporate headquarters, Greater Washington also possesses a thriving environment for small company creation and growth.

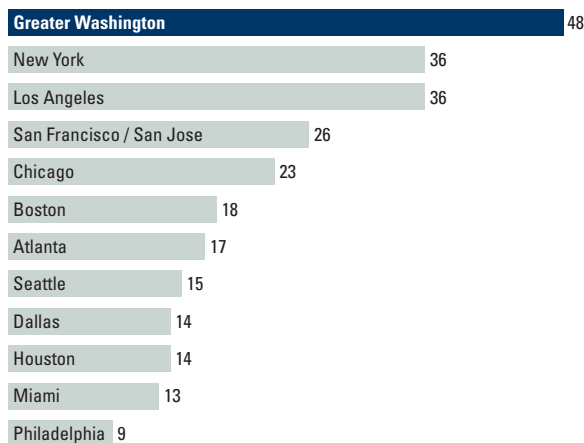
In fact, Greater Washington has the most *Inc.* 500 fastest-growing private businesses of any region in the country — a record held *for the past 13 consecutive years*. In 2009, 48 companies in Greater Washington were recognized by *Inc.* — almost ten percent of the nation's total.

Greater Washington has also seen significant new investment in companies across diverse sectors. In 2009, \$541 million of venture capital was invested in regional companies, and the sectors are on the leading edge of the region's future economic growth. Software, Biotechnology, and Telecommunications companies received the most venture capital, totaling \$268 million in 2009.

The top ten venture capital firms in Greater Washington had more than \$15 billion under management as of 2009.

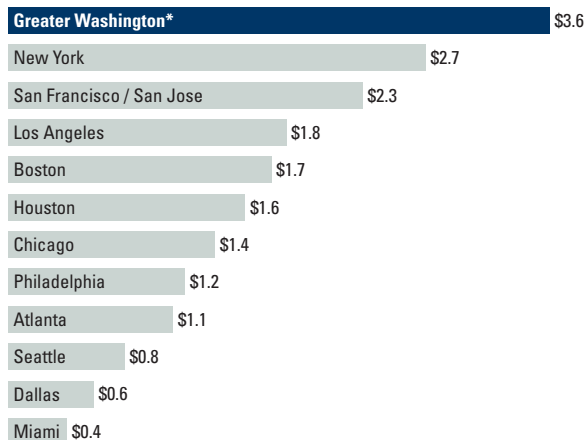
Tomorrow's breakthrough technologies begin with today's pioneering research and development. With one of the world's highest concentration of research institutions, Greater Washington continues to drive innovation across numerous industries. In 2008, research and development expenditures among local universities and colleges exceeded \$3.5 billion.

### Number of Inc. 500 Businesses, 2009



SOURCE: *Inc.*

### Research & Development, 2008 Expenditures at Universities and Colleges (in billions)



SOURCE: National Science Foundation

\*Includes Johns Hopkins University

***In 2009, the Association of Foreign Investors in Real Estate ranked Washington the No. 1 US city for real estate investment, and the No. 2 global city behind London, beating out Paris, Tokyo, Hong Kong and Shanghai.***

## international business

International companies find a welcoming environment in the Greater Washington region. Greater Washington is home to more than 1,000 foreign-owned companies with operations in the region, representing more than 50 countries.

The United Kingdom tops the list, with 240 firms doing business in Greater Washington, followed by France and Canada. Western Europe is not the only area of the globe that finds Greater Washington a good place to do business — Japan, Israel, India, and South Korea are in the region's top ten list of companies operating here.

These international companies represent all industries, including major target sectors for Greater Washington: Aerospace, Defense, Security, and Intelligence; Biotechnology and Life Sciences; and Information and Communication Technology.

More than 350 Greater Washington law firms have international practices that are ready and able to assist foreign firms with all aspects of doing business in the US. And nearly 400 international associations in Greater Washington keep businesses and their employees connected.

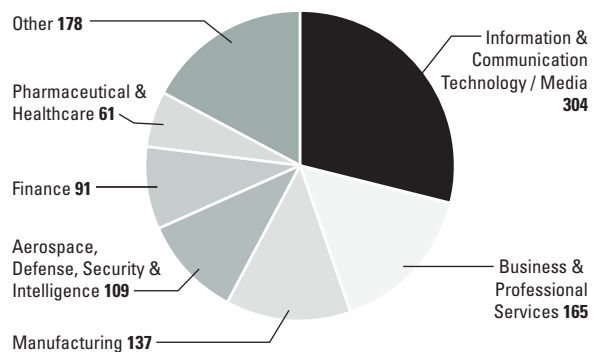
Greater Washington's workforce is well-prepared to do business globally — there are 1.23 million people in the region aged five and older that speak at least one other language in addition to English, fully one quarter of that population.

**Countries with Greatest Number of Companies Operating in Greater Washington, 2009**

Country	Count
England	240
France	119
Canada	114
Japan	71
Germany	63
Switzerland	55
Israel	50
Netherlands	44
India	36
South Korea	35

SOURCE: Greater Washington Initiative

**Industries Represented by Foreign-owned Firms in Greater Washington, 2009 (number of firms)**



SOURCE: Greater Washington Initiative



# global connectivity

Greater Washington offers unparalleled global connectivity.

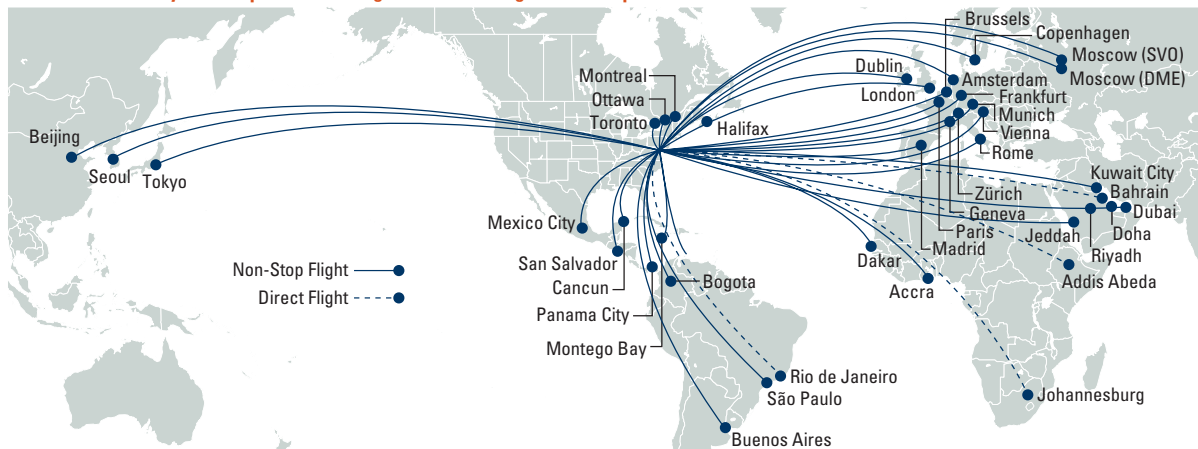
Greater Washington is one of the only metropolitan regions in the US with three world-class airports: Washington Dulles International Airport, Baltimore / Washington International Thurgood Marshall Airport (BWI), and Ronald Reagan Washington National Airport.

More than 580 weekly international non-stop flights serviced nearly 62 million passengers in 2009. In fact, during a year when most US airports experienced a decline in air passenger traffic, BWI Airport witnessed a 2.3 percent increase.

With combined domestic and international service to more than 40 world cities, Greater Washington is connected to the markets that represent 80 percent of the world's economy. Every company doing business in the Greater Washington region has access to its customers, suppliers, and sales teams 24 hours a day.

Reliable global connectivity is essential for businesses to be successful. Among all major airports on the East Coast, Greater Washington's three airports have the best on-time arrival performance (above 80 percent).

**International Weekly Non-Stop and Direct Flights from Washington Area Airports, 2009**



SOURCE: Metropolitan Washington Airports Authority and Baltimore/Washington International Thurgood Marshall Airport

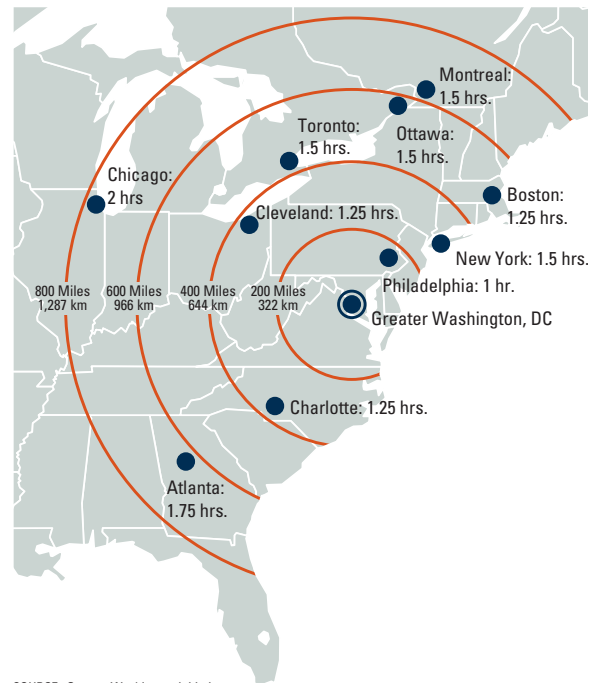
**Sixty percent of the US and Canadian economies — nearly 20 percent of the world gross domestic product — is within a two-hour flight from Greater Washington.**

New service at all three airports by both legacy and low-fare carriers continues to grow, including new, non-stop, all business class service to Paris Orly Airport; daily non-stop service to Accra, Ghana; and same-plane extended service from Kuwait to Bahrain. Last year, new air service began to Colombia, Peru, Chile, and the United Arab Emirates.

The AeroTrain system is the centerpiece of the Metropolitan Washington Airports Authority’s capital development program called D2, Dulles Development. More than \$3 billion has been invested in Dulles Airport improvements since 2001 with completed projects including: new airport traffic control tower, new runway, new parking garages, and the expansion of the Main Terminal. The innovative expansion of the International Arrivals Building adjacent to the Main Terminal is scheduled to be completed in 2011.

Conducting global business in Greater Washington is efficient, convenient, and reliable. Companies that locate in the region find the unrivaled access they need for success and growth.

**East Coast USA: Major Markets and Flight Times**



SOURCE: Greater Washington Initiative

**International Weekly Non-Stop Flights from Greater Washington Airports, June 2010**

Continent	Flights
North America	235
Europe	219
Caribbean	35
Asia	28
Central America	20
South America	19
Middle East	17
Africa	14
<b>Total</b>	<b>587</b>

SOURCE: Metropolitan Washington Airports Authority and Baltimore/Washington International Thurgood Marshall Airport



# federal government foundation

The federal government serves as a powerful component of Greater Washington’s economy, contributing to the region’s economic resilience and stability.

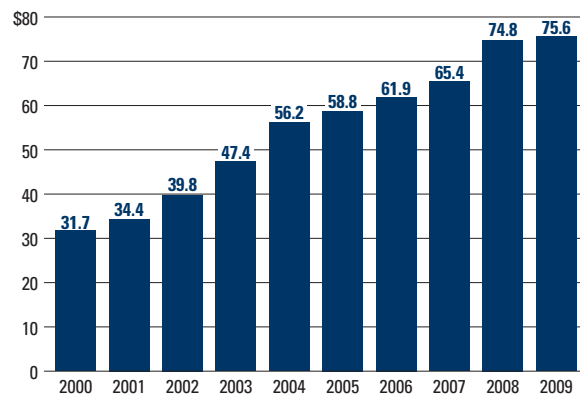
Companies seeking to do business with the US government recognize that they must have a presence in the region to take advantage of the funds available through federal contracting, and Greater Washington possesses an unrivaled expertise in working with the federal government.

Since the mid-1980s, total overall federal spending — including salaries and entitlements — in Greater Washington has continued to rise consistently, from just over \$32 billion to \$166 billion in 2008.

Federal spending on services represented almost three-quarters of the \$75.6 billion in total federal procurement in Greater Washington in 2009. Supplies, equipment, and research and development accounted for the remainder.

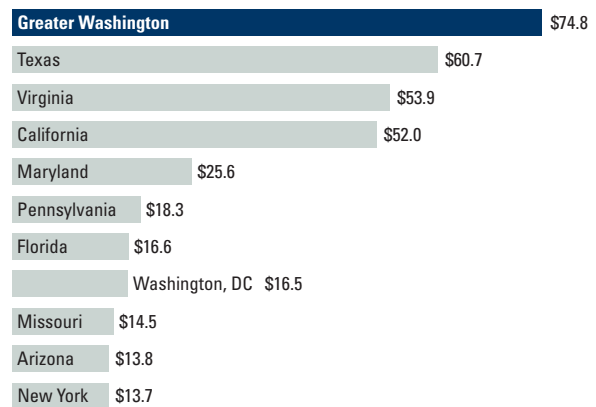
Greater Washington receives the most federal procurement dollars in the US, even when measured against entire states. In 2008, the Greater Washington region received \$14 billion more than second place Texas. And whereas other states like Texas and California are almost entirely dependent on one federal agency for their procurement dollars, Greater Washington benefits from contracts across multiple agencies such as the Department of Defense, Department of Homeland Security, and the Department of Health and Human Services.

Federal Procurement in Greater Washington, 2000–2009 (in billions)



SOURCE: US Census Bureau / General Services Administration

Federal Procurement in Greater Washington Versus Top Ten States, 2008 (in billions)



SOURCE: US Census Bureau / General Services Administration

**On a per capita basis, Greater Washington will receive more federal transportation dollars than any major metropolitan region on the East Coast.**

## infrastructure investment

As the Greater Washington region continues to grow, the region's public and private leadership is investing in priority projects that keep the region a vibrant and healthy place in which to live and do business.

Dulles Rail is a 23-mile extension of the Metrorail system to Dulles International Airport and beyond. Construction is underway, with eight new stops planned in Fairfax County, Virginia.

The Commonwealth of Virginia recently received a \$75 million federal grant for construction of the I-95 High Speed Rail Corridor. The third track, which will run from Stafford County to Prince William County, is an additional component of the Southeast High Speed Rail Corridor linking Greater Washington to the Northeast Corridor.

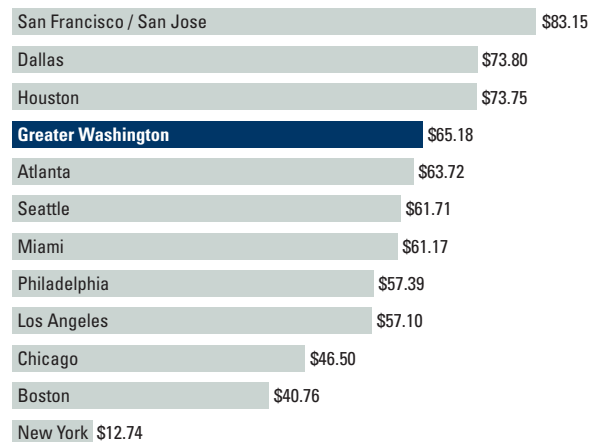
The Inter-County Connector is a new, 18-mile highway under construction which connects Montgomery County, Maryland and Prince George's County, Maryland. This 6-lane toll road will reduce the drive time between Rockville and BWI Airport by approximately 30 minutes.

The reintroduction of street cars as early as 2012 in the District of Columbia will create a reliable transit connection from Union Station, transporting people along neighborhood streets, getting people out of their cars, and revitalizing the Southeast quadrant.

Pepco, BG&E (part of Constellation Energy), and a third regional utility recently won a combined \$354 million in federal stimulus funding to implement smart grid technology and reduce power consumption across the Greater Washington region. These companies will provide an additional \$400 million in matching funds.

Due to Greater Washington's aggressive investment plans for transportation infrastructure, the region will receive significant stimulus funding from the Federal Highway Administration. This investment will help Greater Washington successfully address some of the region's most pressing transportation infrastructure challenges.

### Federal Highway Administration American Recovery and Reinvestment Act Obligations (per capita expenditures)



SOURCE: Federal Highway Administration



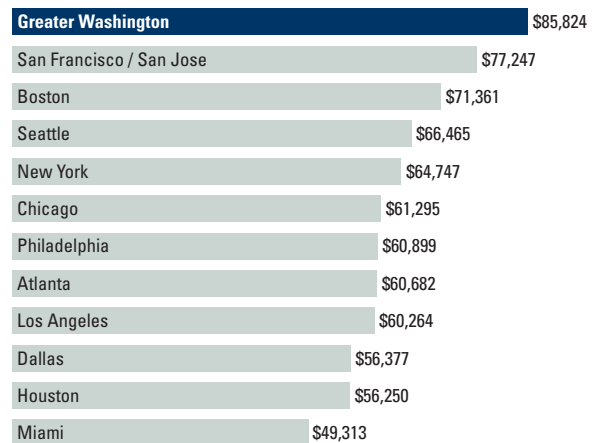
## quality of place & culture

Quality of place is a crucial consideration for any company, its employees, and their families. Residents of Greater Washington love where they live and play. Whether it is walking around the central city of Washington, DC, biking on the many urban and suburban trails, enjoying cultural attractions, or spending money on world-class retail, there is something for everyone in Greater Washington.

Greater Washington values its green space. There are 234,000 acres of parkland and more than 800 miles of bikeways. This equates to 9.4 acres of parkland per 1,000 residents, more than Chicago, Los Angeles, New York, and San Francisco. Nearby mountains and Atlantic Coast beaches, as well as the Chesapeake Bay and area rivers, offer an array of options for recreation.

A mecca of arts and culture, Greater Washington has more than 80 theatre companies. The Shakespeare Theatre Company and the newly-renovated Sydney Harman Hall are two of the nation's leading forces in the presentation and preservation of classic theatre. The Wolf Trap National Park for the Performing Arts provides a wide range of artistic and education programs aimed at enhancing cultural life and ensuring that the arts remain accessible and affordable to everyone. And, of course, The Smithsonian Institution boasts 15 museums plus the National Zoo, most of which are free-of-charge.

### Median Household Income, 2008



SOURCE: US Census Bureau

### Smithsonian Museums in Greater Washington

- African Art Museum
- Air and Space Museum
- Air and Space Museum, Udvar-Hazy Center
- American Art Museum and its Renwick Gallery
- American History Museum
- American Indian Museum
- Anacostia Community Museum
- Arts and Industries Building
- Freer Gallery of Art and Arthur M. Sackler Gallery
- Hirshhorn Museum and Sculpture Garden
- Natural History Museum
- Portrait Gallery
- Postal Museum
- Smithsonian Institution Building, the Castle
- African American History and Culture Museum (opening 2015)

SOURCE: The Smithsonian Institution

**According to the Gallup-Healthways Well-Being Index, Greater Washington residents have the second-best feeling of well-being in the nation based on the current state of their lives.**

For those with a more competitive spirit, Greater Washington is home to the Washington Redskins (NFL), Washington Wizards (NBA), Washington Mystics (WNBA), Washington Nationals (MLB), Washington Capitals (NHL), and DC United (MLS) with 320,000 seats available at major sports stadiums.

Greater Washington’s residents enjoy the highest median household income in the country (\$85,824), with San Francisco / San Jose coming in second at nearly 10 percent less.

Higher incomes and lower cost of living equals a powerful and attractive combination. According to the latest Mercer’s Cost of Living Survey, Washington, DC ranks 66th in the world, well below other US cities such as New York, Los Angeles, San Francisco, Miami, Chicago, and Boston.

The growing cost of healthcare can also be of concern for companies and workers alike. The annual healthcare cost per employee in Greater Washington is among the lowest of any major metropolitan region in the country and significantly below the national average.

It is no wonder, then, that migration patterns into Greater Washington show an influx from all major metropolitan regions including New York, Philadelphia, Los Angeles, Miami, and Boston.

**Cost of Living — Rankings of Major Cities, 2009 (most expensive to least)**

Region	Country	Rank
Tokyo	Japan	1
Moscow	Russia	3
New York City	US	8
Beijing	China	9
Singapore	Singapore	10
Paris	France	13
London	UK	16
Los Angeles	US	23
Amsterdam	Netherlands	29
San Francisco	US	34
Miami	US	45
Frankfurt	Germany	48
Chicago	US	50
Boston	US	60
<b>Washington, DC</b>	<b>US</b>	<b>66</b>
Atlanta	US	75
Toronto	Canada	85
Mexico City	Mexico	137

SOURCE: Mercer’s Cost of Living Survey

**Internal Migration Patterns, 2007–2008  
Inflow of Residents from Other Metropolitan Areas into Greater Washington**

City	Percentage
Baltimore	12.5%
New York	8.7%
Virginia Beach	4.3%
Philadelphia	3.8%
Los Angeles	2.8%
Richmond	2.8%
Miami	2.6%
Boston	2.5%
San Diego	2.5%
Atlanta	2.3%

SOURCE: Internal Revenue Service

# greater washington initiative leadership

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Anne Arundel County, MD  
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**John K. Mauney**

Vice President, Brand & Advertising  
SAIC  
[www.saic.com](http://www.saic.com)

**Charles W. McPherson**

Chief Operating Officer  
The Facchina Group of Companies,  
LLC  
[www.facchina.com](http://www.facchina.com)

**C. Dan Mote, Jr., Ph.D.**

President  
University of Maryland, College Park  
[www.umd.edu](http://www.umd.edu)

**Caroline H. Rapping**

VP Consulting, US State & Local  
Government  
CGI  
[www.cgi.com](http://www.cgi.com)

**John Shetrone, Jr.**

President / CEO  
Vision Technologies, Inc.  
[www.visiontechnologiesinc.net](http://www.visiontechnologiesinc.net)

**The Hon. Corey A. Stewart**

Chairman- At Large  
Prince William County Board of  
Supervisors  
[www.pwccgov.org](http://www.pwccgov.org)

**Robert G. Templin, Ph.D.**

President  
Northern Virginia Community College  
[www.nvcc.edu](http://www.nvcc.edu)

**The Hon. Ken Ulman**

County Executive  
Howard County, MD  
[www.howardcountymd.gov](http://www.howardcountymd.gov)

**Paul Wiedefeld**

Executive Director  
Baltimore/Washington International  
Thurgood Marshall Airport  
[www.bwiairport.com](http://www.bwiairport.com)

**James M. Wright**

Principal  
Page Southerland Page  
[www.pspaec.com](http://www.pspaec.com)

# gwi investors

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## Executive Level

### Bank of America



Bank of America  
www.bankofamerica.com



METROPOLITAN WASHINGTON  
AIRPORTS AUTHORITY

Metropolitan Washington  
Airports Authority  
www.mwaa.com



SunTrust Bank  
www.suntrust.com



Capital One  
www.capitalone.com



Pepco Holdings  
www.pepcoholdings.com



WACHOVIA  
A Wells Fargo Company

Wachovia, a Wells Fargo Company  
www.wachovia.com



District of Columbia Government  
www.dc.gov



Prince George's County  
www.co.pg.md.us

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## Trustee Level



Acumen Solutions, Inc.  
www.acumensolutions.com



Arlington County  
www.co.arlington.va.us



CGI  
www.cgi.com



Alexandria, City of  
www.alexandriava.gov



Aronson & Company  
www.aronsoncompany.com



Constellation Energy  
www.constellation.com



Anne Arundel County  
www.aacounty.org



Baltimore / Washington International  
Thurgood Marshall Airport  
www.bwiairport.com



Corporate Office Properties Trust  
www.copt.com

## Trustee Level *(continued)*



Deloitte  
www.deloitte.com



Ernst & Young  
www.ey.com



Facchina Group of Companies, The  
www.facchina.com



Fairfax County  
www.co.fairfax.va.us



Frederick County  
www.co.frederick.md.us



Howard County  
www.co.ho.md.us



M&T Bank  
www.mtb.com



Montgomery County  
www.montgomerycountymd.gov



Prince William County  
www.pwcgov.org



SAIC  
www.saic.com

## Partner Level

Accenture  
www.accenture.com

American University  
Kogod School of Business  
www.kogod.american.edu

Apex Home Loans, Inc.  
www.apexhomeloans.com

Bowie, City of  
www.cityofbowie.org

Calvert County  
www.ecalvert.com

Cannon Design  
www.cannondesign.com

Charles County  
www.charlescounty.org

Courtesy Associates  
www.courtesyassociates.com

Creative Associates International, Inc.  
www.caii-dc.com

Destination DC  
www.destinationdc.org

Dickstein Shapiro LLP  
www.dicksteinshapiro.com

Doggett Enterprises, Inc.  
www.doggettsparking.com

Dominion Virginia Power  
www.dom.com

Fairfax, City of  
www.fairfaxva.gov

Falls Church, City of  
www.developfallschurchva.gov

Fort Lincoln New Town Corp.

Frederick, City of  
www.cityoffrederick.com

George Mason University,  
School of Management  
www.gmu.edu

Georgetown University  
www.georgetown.edu

High Street Partners  
www.hsp.com

HMSHost  
www.hmshost.com

Host Hotels & Resorts  
www.hosthotels.com

HSBC Bank USA  
www.us.hsbc.com

IDI Group  
www.idigroup.com

KGD Architecture  
www.kgdarchitecture.com

Korn/Ferry International  
www.kornferry.com

Laurel, City of  
www.laurel.md.us

Loudoun County  
www.loudoun.gov

Manassas, City of  
www.manassascity.org

Northern Virginia Community College  
www.nvcc.edu

Office Movers, Inc  
www.officemovers.com

Page Southerland Page LLP  
www.pspaec.com

PNC Bank  
www.pnc.com

Rockville, City of  
www.rockvillemd.gov

Rodgers Consulting, Inc.  
www.rodgers.com

St. Mary's County  
www.co.saint-marys.md.us

Stafford County  
www.co.stafford.va.us

Summit Executive Resources, LLC  
www.summitexecutiveresources.com

Tatum LLC  
www.tatumllc.com

Telos Corporation  
www.telos.com

Washington Post, The  
www.washingtonpost.com

Leesburg, Town of  
www.leesburgva.gov

Vint Hill Economic  
Development Authority  
www.vinthill.com

University of Maryland, College Park  
www.umd.edu

Virginia Tech, National Capital Region  
www.vt.edu

Vision Technologies, Inc.  
www.visiontechnologiesinc.net

Washington Real Estate  
Investment Trust  
www.writ.com

ZGF Architects LLP  
www.zgf.com

# local economic development offices

**Alexandria, VA Economic Development Partnership, Inc.**  
Mr. Val Hawkins, President & CEO  
Telephone: (703) 739-3820  
www.alexecon.org

**Anne Arundel County, MD Economic Development Corp.**  
Mr. Robert L. Hannon,  
President & CEO  
Telephone: (410) 222-7410  
www.aaedc.org

**Arlington County, VA Department of Economic Development**  
Dr. Terry Holzheimer, Director  
Telephone: (703) 228-0808  
www.arlingtonvirginiausa.com

**Calvert County, MD Department of Economic Development**  
Ms. Linda S. Vassallo, Director  
Telephone: (410) 535-4583  
www.ecalvert.com

**Charles County, MD Economic Development & Tourism Department**  
Mr. George L. Robertson, Director  
Telephone: (301) 885-1340  
www.ccbiz.org

**City of Bowie, MD Dept. of Planning and Economic Development**  
Mr. John Henry King,  
Director, Economic Development  
Telephone: (301) 809-3032  
www.cityofbowie.org

**City of Fairfax, VA Office of Economic Development**  
Mr. Geoff Durham, Director,  
Economic Development Division  
Telephone: (703) 385-7851  
www.fairfaxva.gov

**City of Falls Church, VA Economic Development**  
Mr. Richard Goff, Director  
Telephone: (703) 248-5491  
www.developfallschurch.org

**City of Frederick, MD Economic Development**  
Mr. Richard G. Griffin,  
Economic Development Director  
Telephone: (301-600-6360  
www.businessinfrederick.com

**City of Laurel, MD Department of Community Planning & Business Services**  
Mr. Karl Brendle, Director, Department of Development Management  
Telephone: (301) 725-5300  
www.laurel.md.us

**City of Manassas, VA Economic Development Office**  
Ms. Elizabeth S. Via,  
Director, Community Development  
Telephone: (703) 257-8223  
www.manassascity.org

**District of Columbia Government**  
The Hon. Valerie Santos,  
Deputy Mayor  
Dept. of Planning and Economic Development  
Telephone: (202) 727-6365  
www.dcbiz.dc.gov

**Fairfax County, VA Economic Development Authority**  
Dr. Gerald L. Gordon, President & CEO  
Telephone: (703) 790-0600  
www.fairfaxcountyeda.org

**Frederick County, MD Office of Economic Development**  
Ms. Laurie M. Boyer,  
Executive Director  
Telephone: (301) 600-1059  
www.discoverfrederickmd.com

**Howard County, MD Economic Development Authority**  
Mr. Richard W. Story,  
Chief Executive Officer  
Telephone: (410) 313-6500  
www.hceda.org

**Loudoun County, VA Department of Economic Development**  
Mr. Robert Chirles, Interim Director  
Telephone: (703) 777-0426  
www.biz.loudoun.gov

**Maryland Department of Business and Economic Development**  
The Hon. Christian Johansson,  
Secretary  
Telephone: (410) 767-6300  
www.choosemaryland.org

**Montgomery County, MD Department of Economic Development**  
Mr. Steve Silverman, Director  
Telephone: (240) 777-2000  
www.smartmontgomery.com

**Prince George's County, MD Economic Development Corp.**  
Mr. Kwasi Holman, President/CEO  
Telephone: (301) 583-4650  
www.pgcedc.com

**Prince William County, VA Department of Economic Development**  
Mr. Martin J. Briley, Executive Director  
Telephone: (703) 792-5500  
www.pwcecondev.org

**Rockville Economic Development, Inc.**  
Ms. Sally L. Sternbach,  
Executive Director  
Telephone: (301) 315-8096  
www.rockvilleredi.org

**St. Mary's County, MD Department of Economic & Community Development**  
Mr. Bob Schaller, Director  
Telephone: (301) 475-4200  
www.co.saint-marys.md.us

**Stafford County, VA Department of Economic Development**  
Mr. Timothy J. Baroody, Director  
Telephone: (540) 658-8681  
www.gostaffordva.com

**Town of Leesburg, VA**  
Ms. Marantha Edwards,  
Economic Development Manager  
Telephone: (703) 771-2734  
www.leesburgva.org

**Vint Hill Economic Development Authority**  
Ms. Patricia M. White,  
Marketing Manager  
Telephone: (540) 347-6965  
www.vinthill.com

**Virginia Economic Development Partnership**  
Mr. Jeff Anderson, President & CEO  
Telephone: (804) 545-5600  
www.yesvirginia.org

**Washington, DC Economic Partnership**  
Mr. Steve Moore, President/CEO  
Telephone: (202) 661-8670  
www.wdcep.org



*Helping Companies Make Informed Decisions*  
[www.greaterwashington.org](http://www.greaterwashington.org)

## about gwi

The Greater Washington Initiative (GWI) is the regional economic development, marketing, and research organization for the Greater Washington region.

Established 16 years ago as a private-public partnership and an affiliate of the Greater Washington Board of Trade, GWI markets the Greater Washington region and provides confidential, customized, and complimentary services to site location consultants and companies considering Greater Washington as a business location.

Led by a Board of Trustees that is comprised of private, public, and higher education executives, GWI is financially supported by the region's public jurisdictions, private companies, and higher education institutions.

GWI also convenes and coordinates with the Council of Economic Development Officials (CEDO), a collaborative group of top economic development professionals focused on effecting continual improvements in the region's business climate. For a list of local economic development offices, see page 32.

### Are you looking to locate or expand your business into the Greater Washington region?

Contact GWI for complimentary services that can help you:

- › **UNDERSTAND:** Statistics and trends about Greater Washington's demographics, economy, and key industries.
- › **COMPARE:** Regional data to other US and international regions to determine if Greater Washington is the right place for your company.
- › **LOCATE:** Real estate and economic development information.
- › **CONNECT:** Contacts and resources — from legal to accounting to venture capital and staffing.

### GWI Senior Management Team

Matt S. Erskine, Executive Director

Angie Lawry, Director of Strategic Marketing

John A. Rees, Director of Strategic Research

James C. Dinegar, President & CEO,  
Greater Washington Board of Trade



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