



MAG Region Sister Cities Research Project

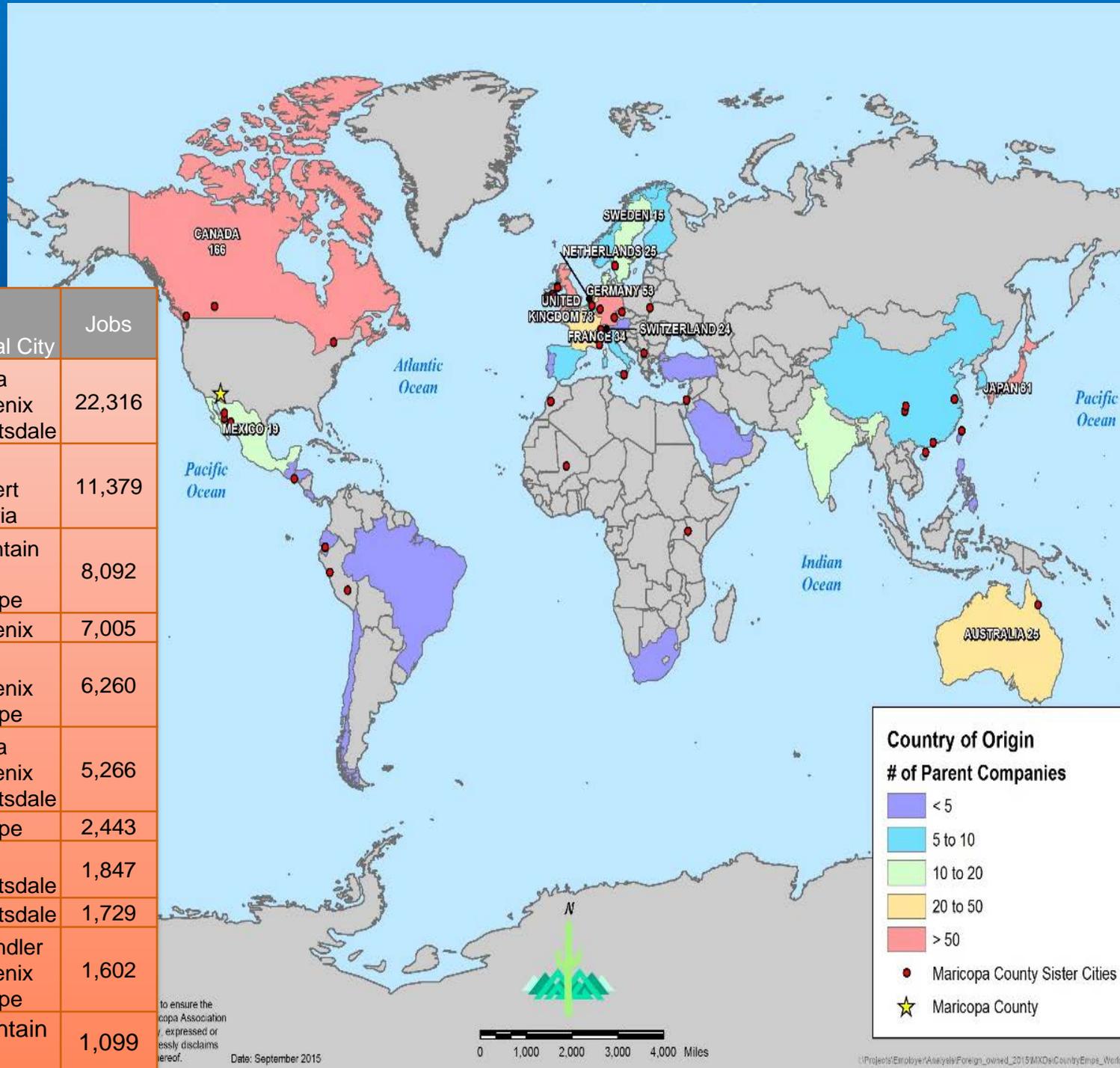
Going Global With Economic Purpose

March 2016

Sister Cities & AZ Parent Companies

Country of Origin

Sister City	Country	Local City	Jobs
Burnaby Calgary Kingston	Canada	Mesa Phoenix Scottsdale	22,316
Newtownabbey Ards	United Kingdom	Gilbert Peoria	11,379
Dierdorf Regensburg	Germany	Fountain Hills Tempe	8,092
Himeji	Japan	Phoenix	7,005
Grenoble Beaulieu-sur-Mer	France	Phoenix Tempe	6,260
Guaymas Hermosillo Álamos	Mexico	Mesa Phoenix Scottsdale	5,266
Trollhättan	Sweden	Tempe	2,443
Interlaken	Switzerland	Scottsdale	1,847
Cairns	Australia	Scottsdale	1,729
Tullamore Ennis Carlow	Ireland	Chandler Phoenix Tempe	1,602
Kasterlee	Belgium	Fountain Hills	1,099





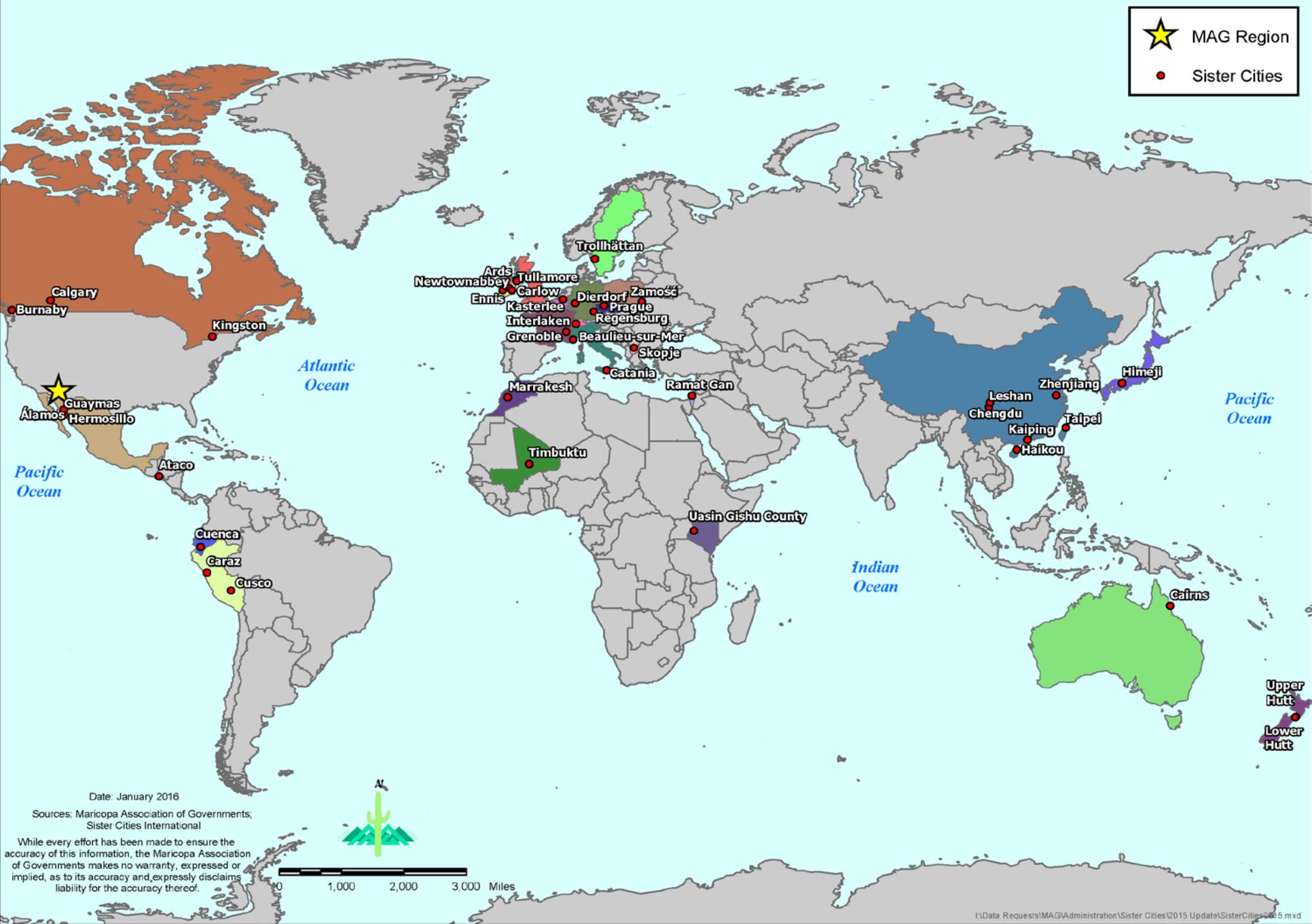
Project Premise

Where Are We?

Versus

Where *Should* We Be?

MAG Region Sister Cities



Date: January 2016

Sources: Maricopa Association of Governments, Sister Cities International

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Arizona Top Trade and FDI Markets

Trade

- Mexico
- Canada**
- UK*
- China**
- Germany**

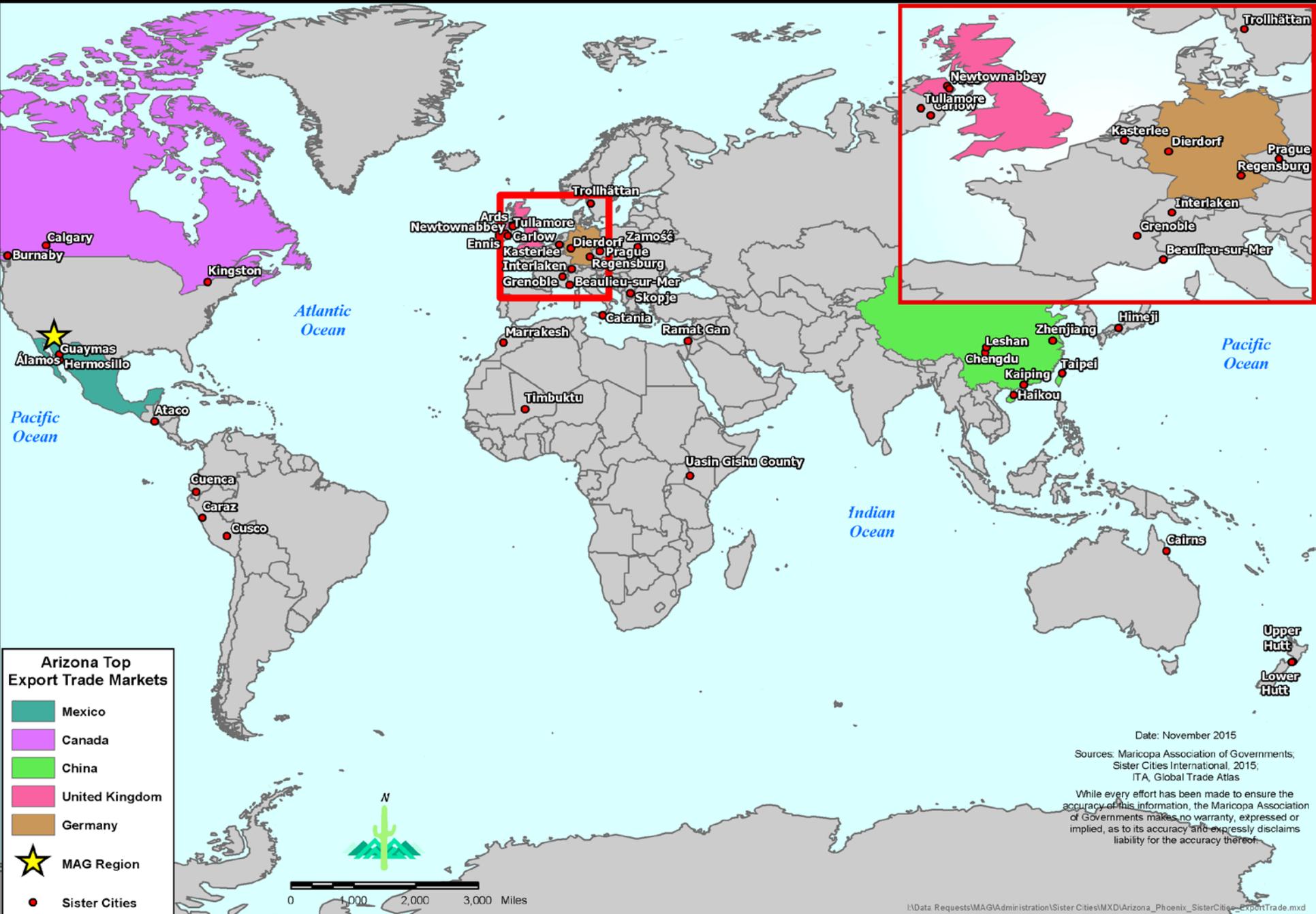
FDI

- Canada**
- UK*
- Germany**
- Japan**
- France
- Mexico
- Luxembourg*
- Spain
- Netherlands*
- Sweden*
- Switzerland*

* Top 10 Most Innovative Global Economy

**Top 20 Most Innovative Global Economy

MAG Region Sister Cities with Arizona's Top Export Trade Markets



Arizona Top Export Trade Markets

- Mexico
- Canada
- China
- United Kingdom
- Germany
- MAG Region
- Sister Cities

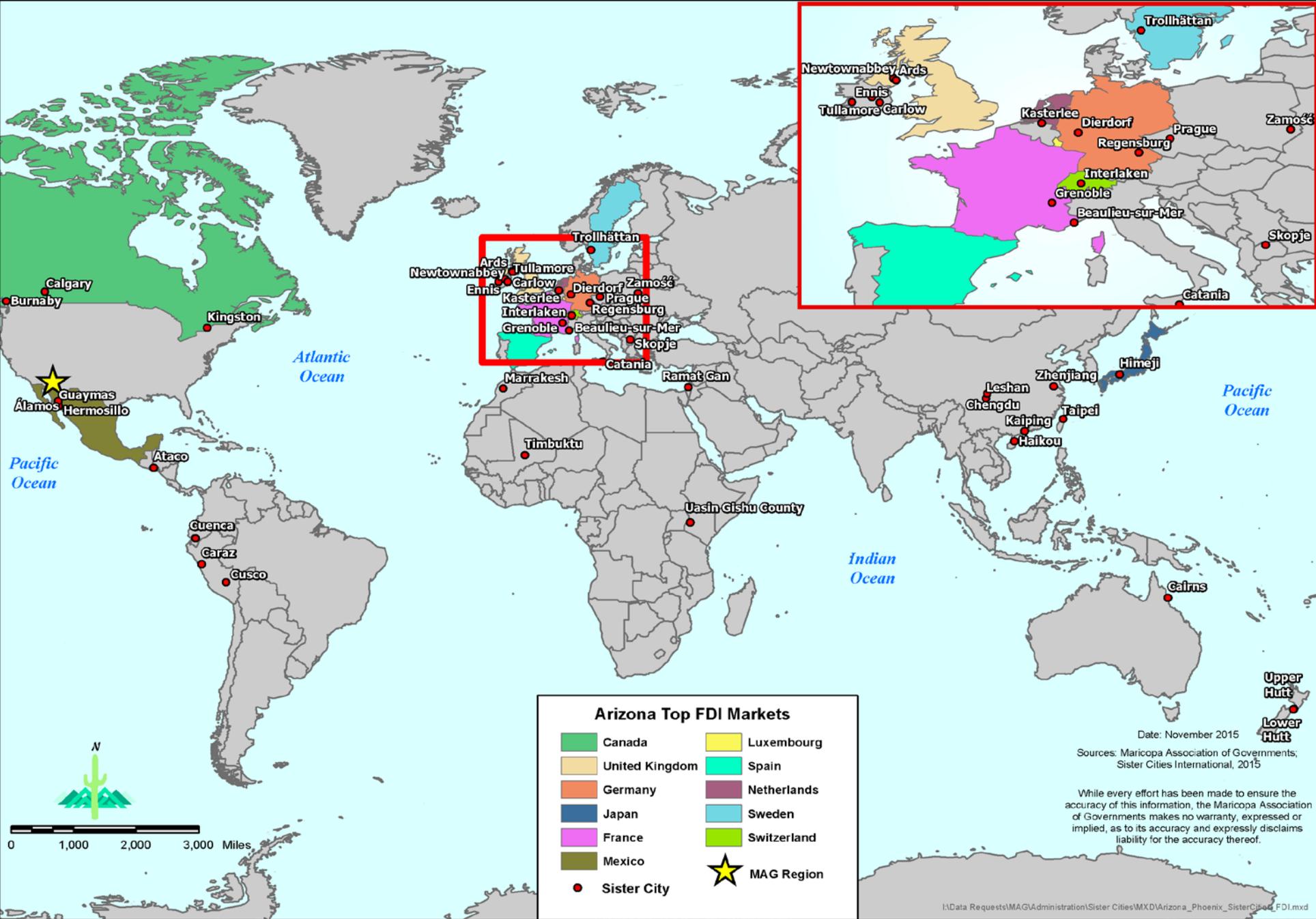


Date: November 2015

Sources: Maricopa Association of Governments, Sister Cities International, 2015, ITA, Global Trade Atlas

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MAG Region Sister Cities with Arizona's Top FDI Markets

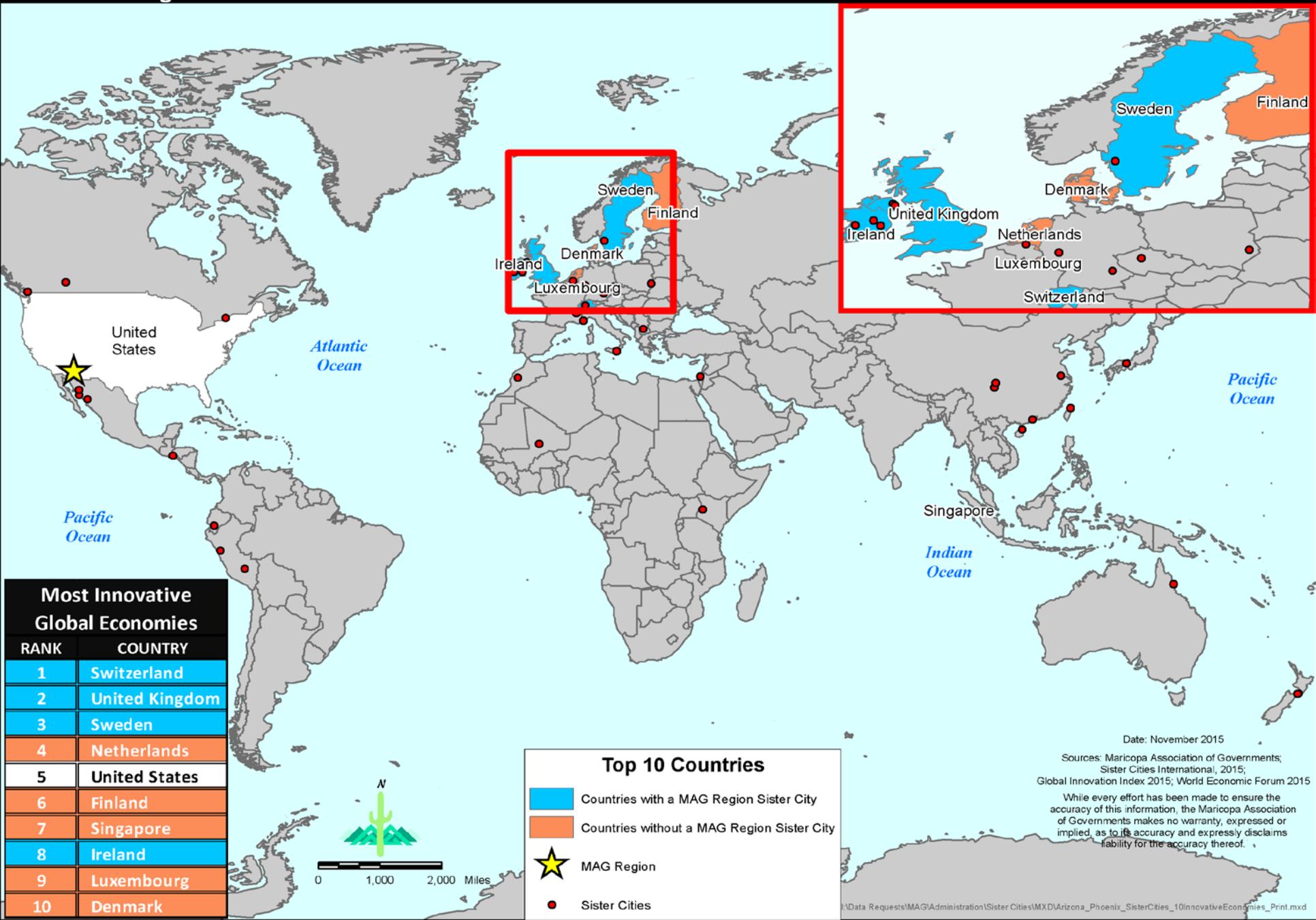


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Top 10 Countries With the Most Innovative Economies With MAG Region Sister Cities



Most Innovative Global Economies	
RANK	COUNTRY
1	Switzerland
2	United Kingdom
3	Sweden
4	Netherlands
5	United States
6	Finland
7	Singapore
8	Ireland
9	Luxembourg
10	Denmark

Top 10 Countries

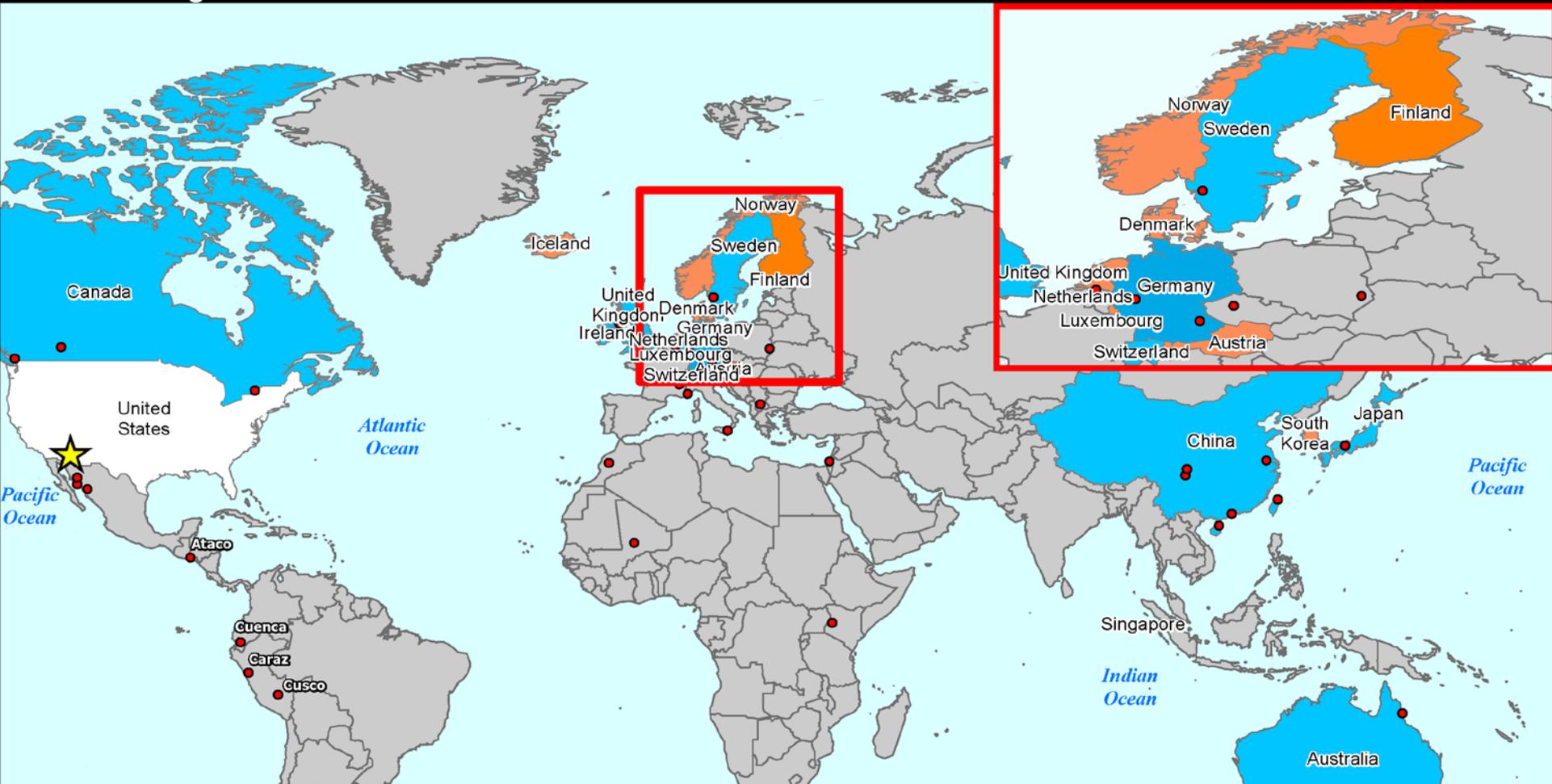
- Countries with a MAG Region Sister City
- Countries without a MAG Region Sister City
- MAG Region
- Sister Cities

Date: November 2015

Sources: Maricopa Association of Governments; Sister Cities International, 2015; Global Innovation Index 2015; World Economic Forum 2015

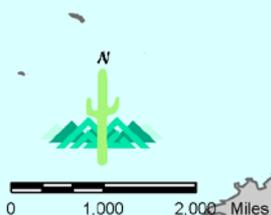
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Top 20 Countries With the Most Innovative Economies With MAG Region Sister Cities



Most Innovative Global Economies

RANK	COUNTRY	RANK	COUNTRY
1	Switzerland	11	China
2	United Kingdom	12	Germany
3	Sweden	13	Iceland
4	Netherlands	14	South Korea
5	United States	15	New Zealand
6	Finland	16	Canada
7	Singapore	17	Australia
8	Ireland	18	Austria
9	Luxembourg	19	Japan
10	Denmark	20	Norway



Top 20 Countries

- Countries with a MAG Region Sister City
- Countries without a MAG Region Sister City
- ★ MAG Region
- Sister Cities

Date: November 2015

Sources: Maricopa Association of Governments; Sister Cities International, 2015; Global Innovation Index 2015; World Economic Forum 2015

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I:\Data Requests\MAG\Administration\Sister Cities\MXD\Arizona_Phoenix_SisterCities_InnovativeEconomies.mxd

Factors for Analysis

- External
 - Innovative Global Economies
 - Global Innovation Index 2015
 - World Economic Forum 2015 Global Competitiveness Report
 - Top MAG Region and AZ Trade and FDI Markets
 - Geographic Adjacency to Cities for Economic Opportunity versus Existing Sister City Locations
 - Kaiping (Mesa) vs. Shenzhen or Guangzhou; Sichuan Province – Chengdu (Phoenix) vs. Mianyang; Canton of Bern - Interlaken (Scottsdale) vs. neighboring Canton of Neuchâtel or Canton of Vaud (Lausanne)
- Internal
 - Existing Sister City Markets
 - Targeted Industry Sectors
 - Existing
 - Emerging
 - International Companies Present in Community by Country of Origin

Questions Posed

- Where are your existing Sister Cities located?
- Does the city have an economic development strategy associated with existing sister cities – if yes, which one(s)?
- Are there any efforts to establish new sister cities – if so, where?
- What are your top 3-5 industry sectors for attraction/expansion?
- Do you have any new emerging industry sectors of opportunity? If so, what are they?
- Does the Economic Development Department currently engage with your sister city program(s)?

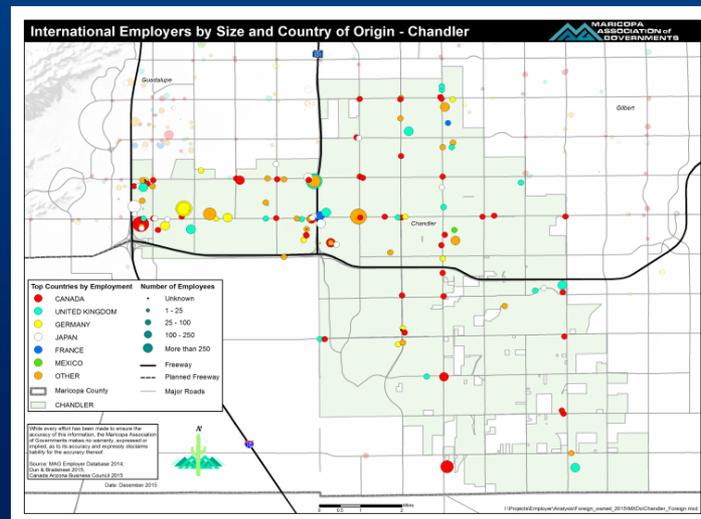
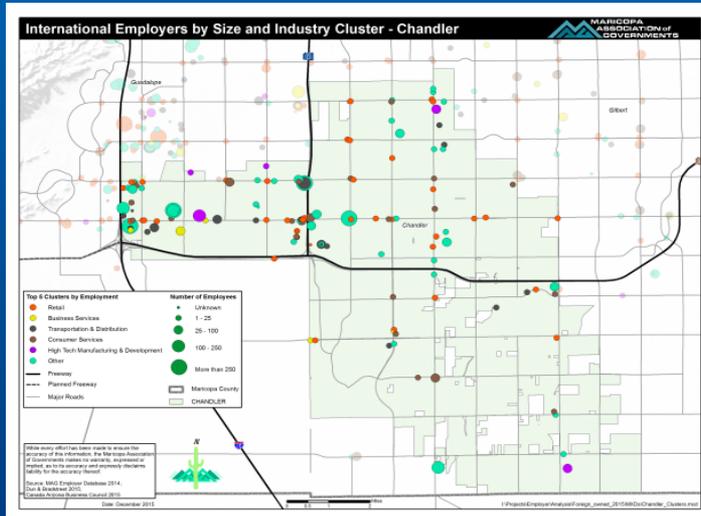
City of Chandler

Sister Cities

- Tullamore, Ireland*
- Tainan, Taiwan (In Development)

Existing and Emerging Industry Sectors

- Advanced Business Services
- Aerospace/Aviation
- High Technology (i.e. electronics, semi-conductors)
- Life Sciences/Biotechnology
- Healthcare/Specialty Pharmaceutical

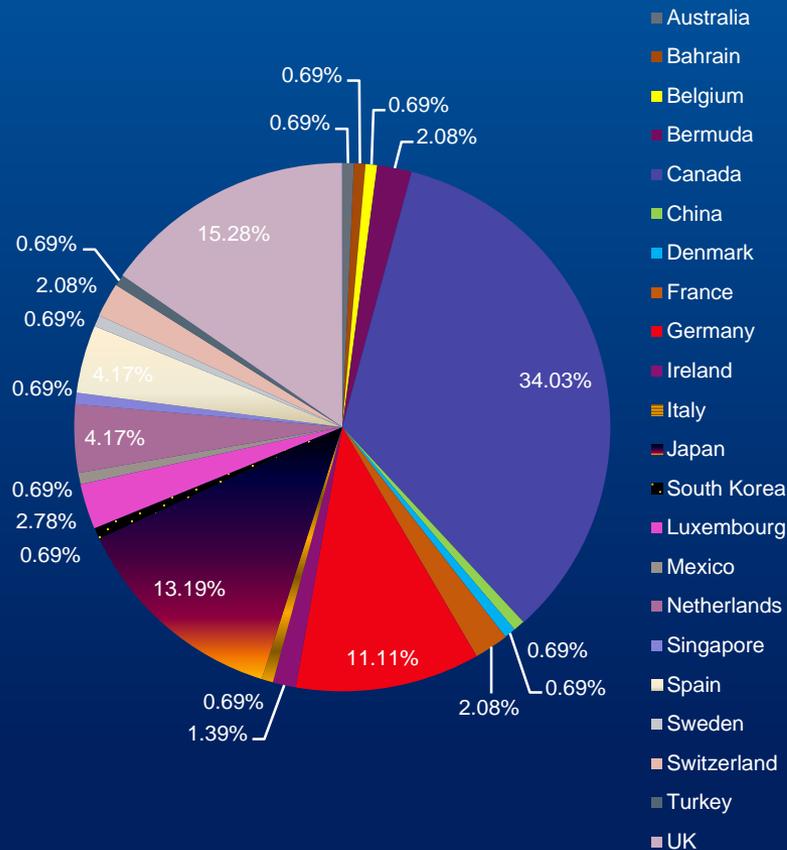


* Top 10 Most Innovative Global Economy

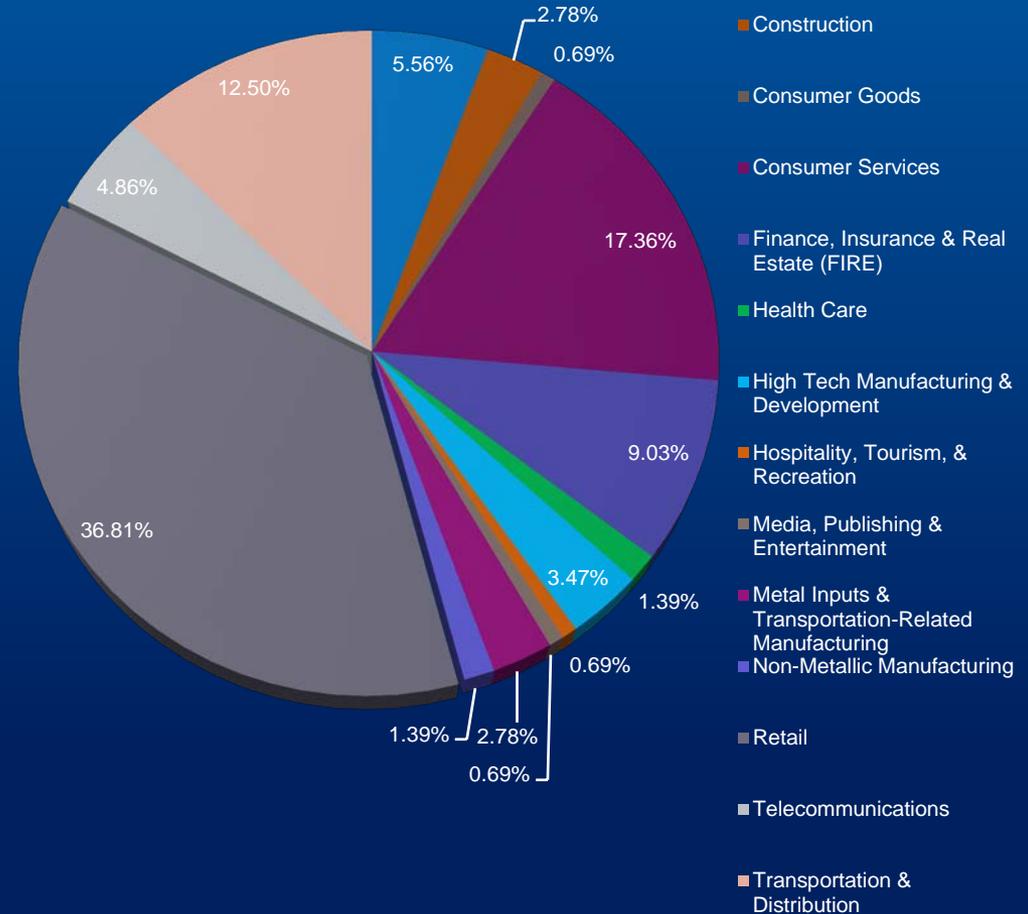
International Firm Locations in Chandler and Sector Type



Chandler: 144 Locations



Industry Sectors Represented

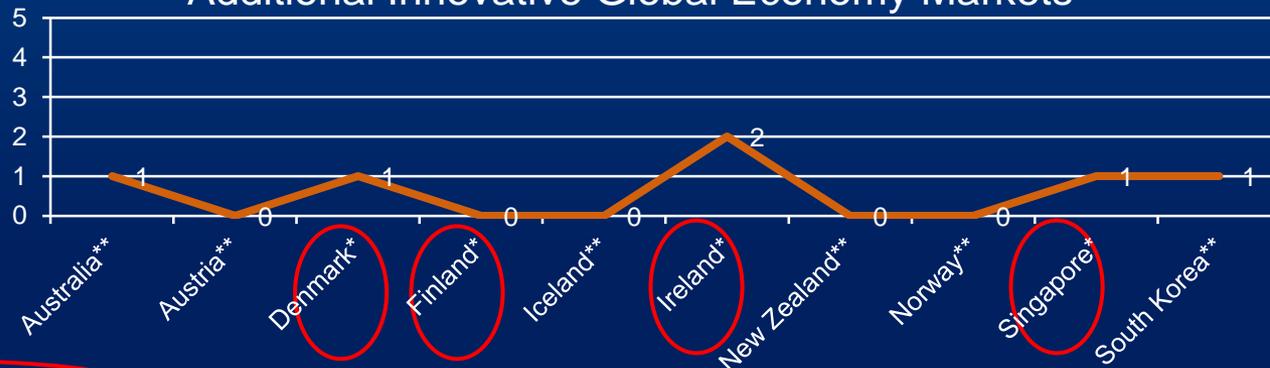


International Business Locations in Chandler and Most Innovative Global Economy Market Opportunities

Existing AZ Trade and FDI Markets



Additional Innovative Global Economy Markets



* Top 10 Most Innovative Global Economy
 **Top 20 Most Innovative Global Economy

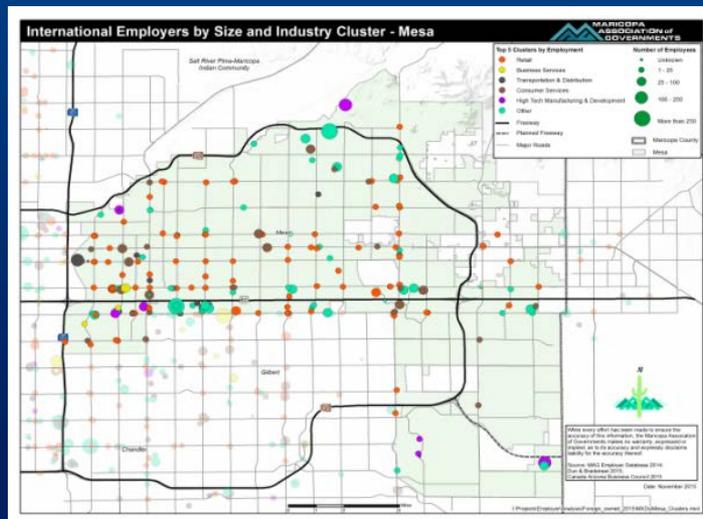
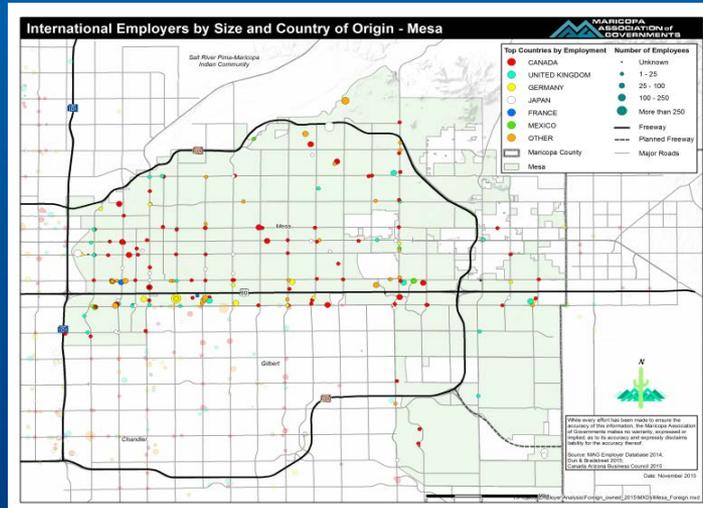
City of Mesa

Sister Cities

- Burnaby, Canada**
- Guaymas, Mexico
- Kaiping, China**
- Upper Hutt, NZ**
- Caraz, Peru

Existing and Emerging Industry Sectors

- Healthcare
- Aerospace
- Education
- Technology
- Advanced Manufacturing/Manufacturing
- Data Centers
- Medical Devices
- New Technologies

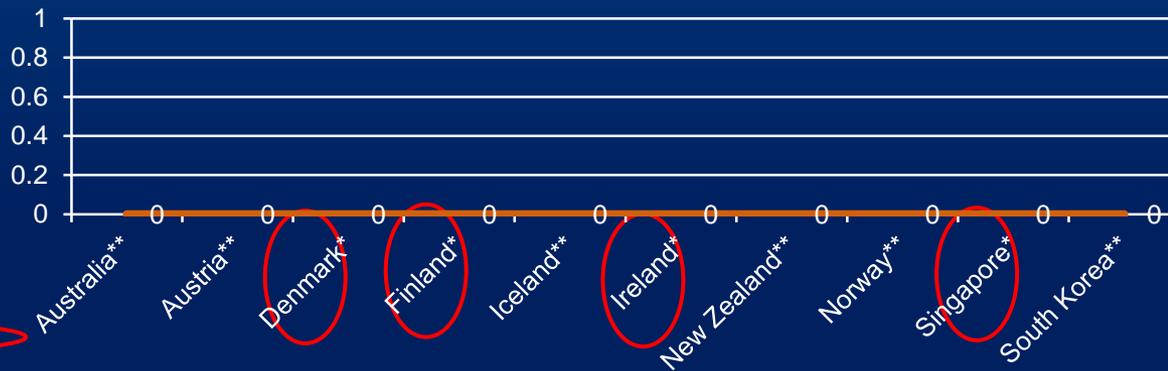


International Business Locations in Mesa and Most Innovative Global Economy Market Opportunities

Existing AZ Trade and FDI Markets



Additional Innovative Global Economy Markets



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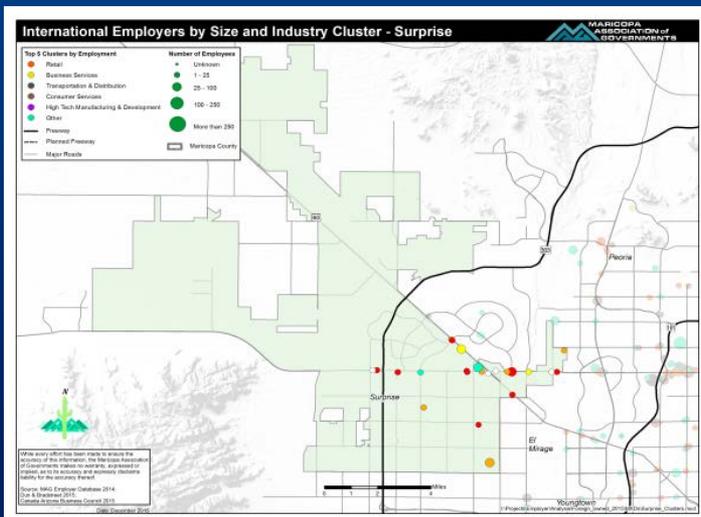
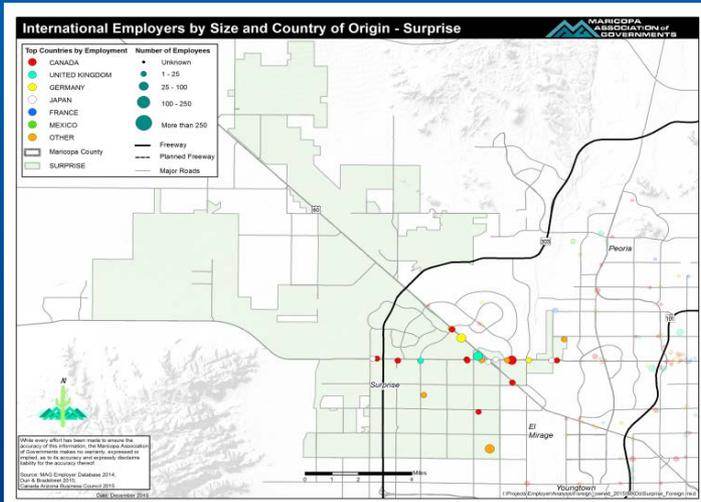
City of Surprise

Sister Cities

- Pending/Looking for Partners

Existing and Emerging Industry Sectors

- Advanced Business Services
- Advanced Manufacturing
- Clean Energy & Technology
- Innovation & Entrepreneurship
- Specialty Healthcare

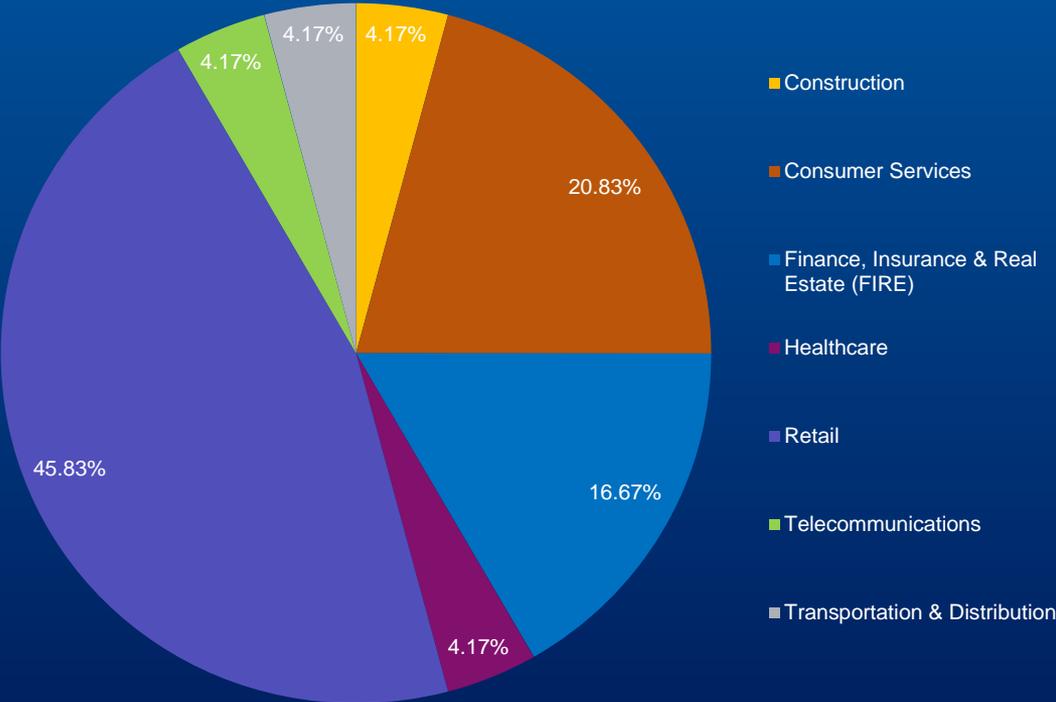
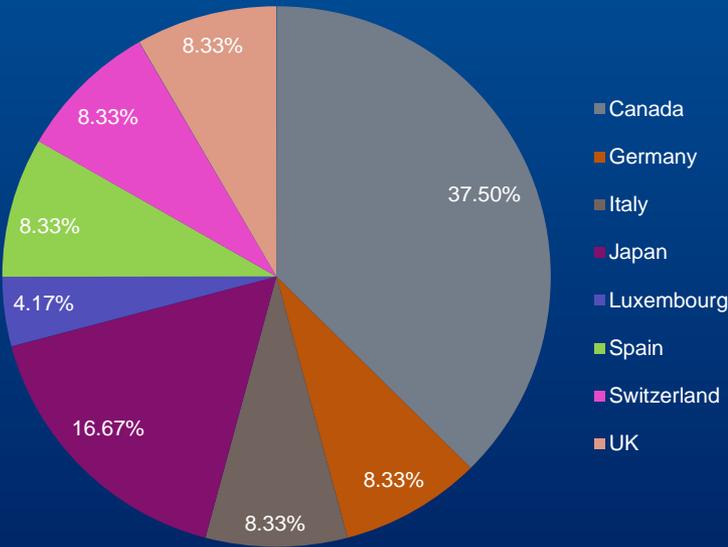


International Business Locations and Sectors Represented in Surprise



Surprise: 24 Locations

Industry Sectors Represented

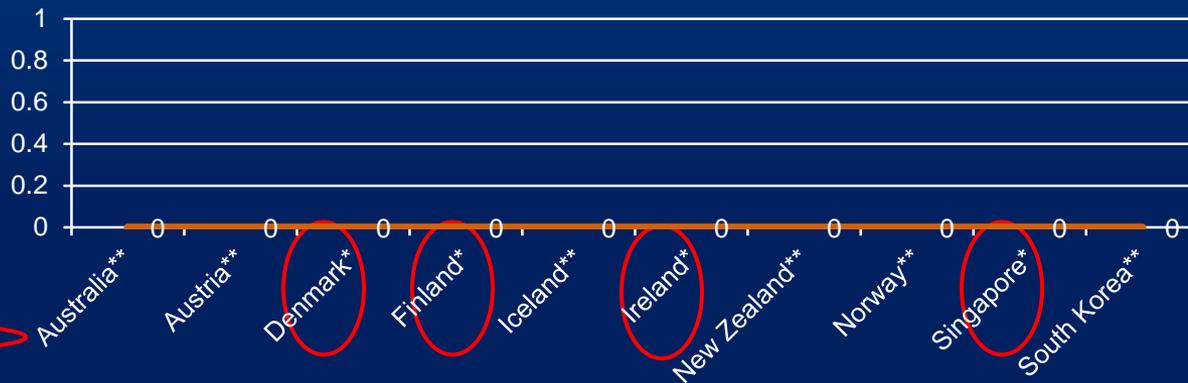


International Business Locations in Surprise and Most Innovative Global Economy Market Opportunities

Existing AZ Trade and FDI Markets



Additional Innovative Global Economy Markets



* Top 10 Most Innovative Global Economy
 **Top 20 Most Innovative Global Economy

Countries Presenting Global Economic Development Opportunity (Listed by Existing International Footprint)

<u>Chandler</u>	<u>Mesa</u>	<u>Surprise</u>
Canada	Canada	Canada
UK	Japan	Japan
Japan	UK	Germany
Germany	Germany	Spain
Netherlands	Luxembourg	Switzerland
Spain	Spain	UK
Luxembourg	Switzerland	Luxembourg
France	France	China
Switzerland	Mexico	France
China	Netherlands	Mexico
Mexico	China	Netherlands
Sweden	Sweden	Sweden

Additional Top "10" Countries With Most Innovative Economies
New Market Opportunities

Denmark
Finland
Ireland
Singapore

Recommendations

- Leverage Existing Sister City Markets (or Neighboring Markets) To Enhance Economic Development Opportunity
 - Align Markets with Strategic Economic Development Sectors
 - Identify Top 3-5 International Markets for Further Analysis Enhancing Local Economic Development Priorities in Existing Sector Areas and Emerging Sectors
 - Consult Sister Cities International's *Cities Seeking Cities* Program that Helps Member Cities Find New Partner Communities Abroad
- Build Greater Connectivity and Collaboration Between Sister City Programs and Economic Development Departments
- Consider Evaluating Potential Cities Utilizing the Following Criteria:
 - Population and Economy
 - Infrastructure (airport, rail, freeway, maritime port, fiber, water)
 - Current Population/Market Resources within Phoenix Metro Area to Enhance Outreach and Building In-Country Connections (MAG international data, GPEC data, ADEC, Honorary Consuls General, business owners, international residents etc.)
 - Existing International Businesses from Target Country to Guide Trade/FDI Strategy
 - Locations Where AZ Universities Are Also Present to Include Higher Education/Industry Pipeline/R&D Hook
- Identify Resources to Support International Economic Development Initiatives



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DISCUSSION

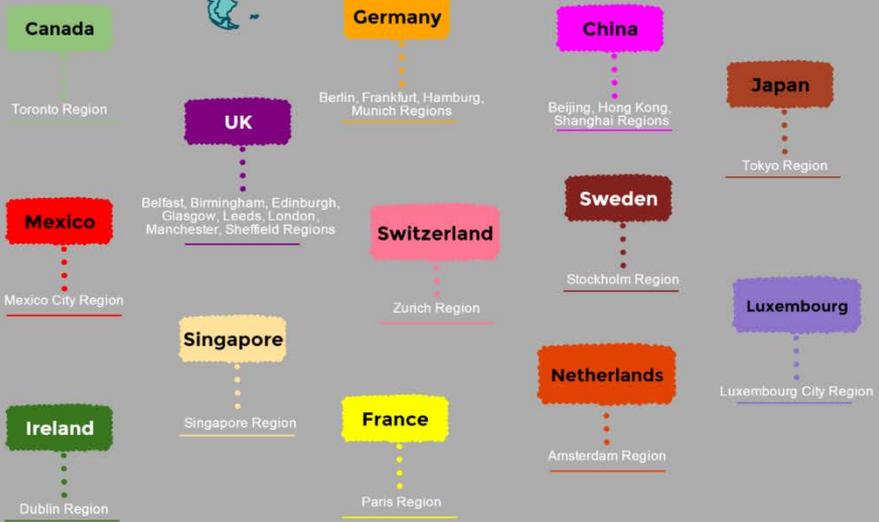
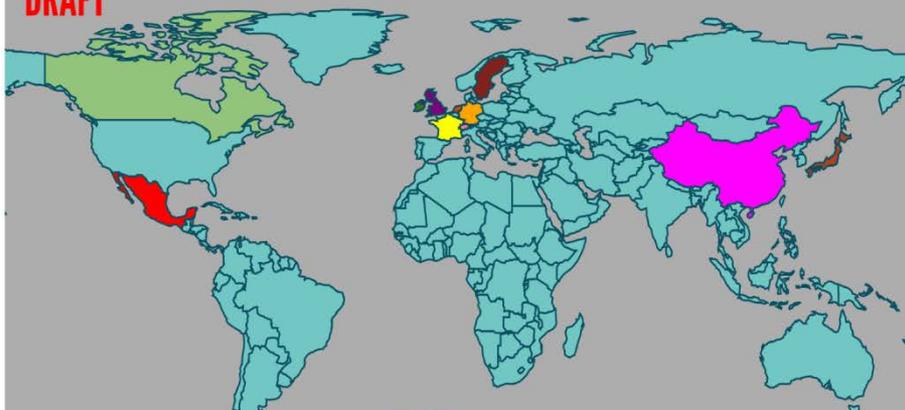


Industry Sectors and Global Regions/Cities of Interest

APPENDIX SLIDES

ADVANCED BUSINESS SERVICES/FINANCIAL

DRAFT

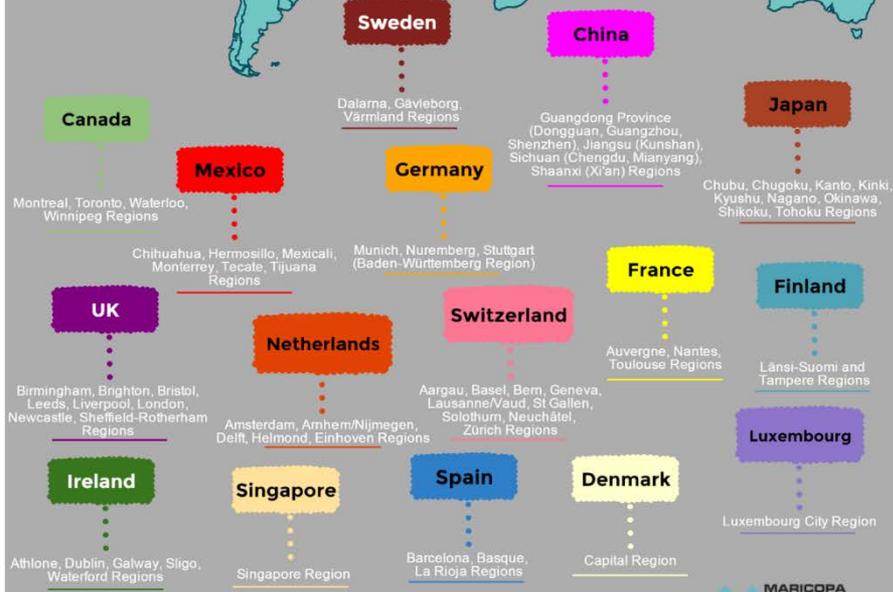
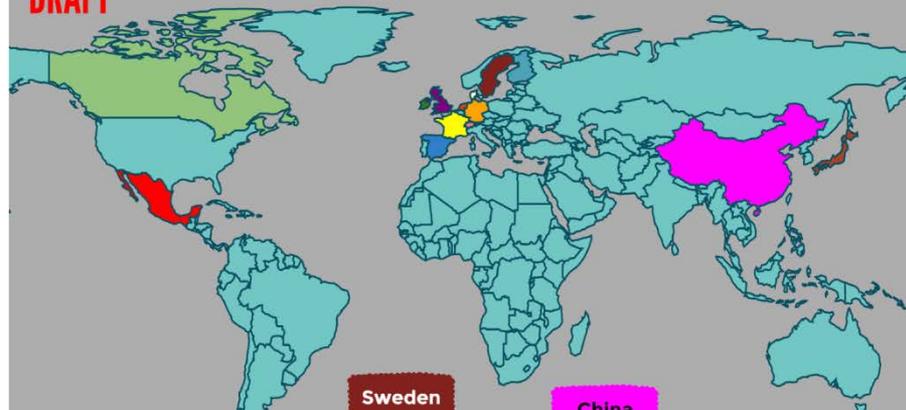


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ADVANCED MANUFACTURING

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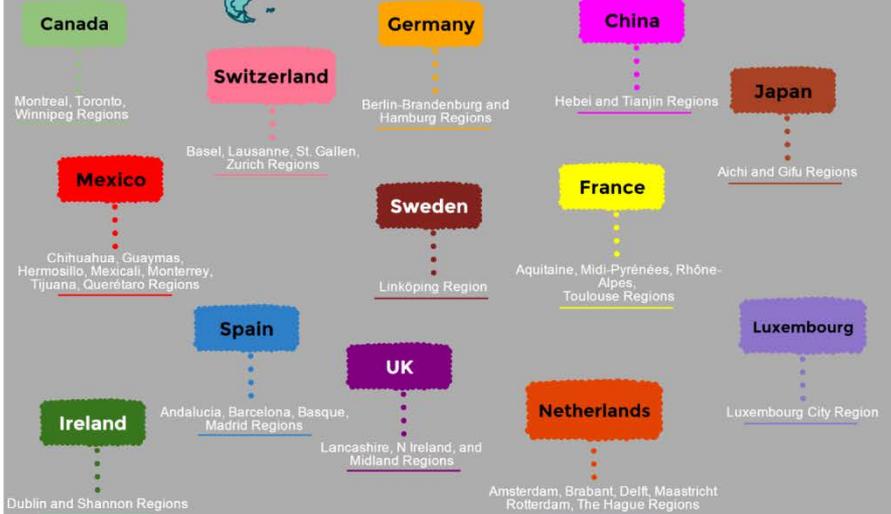
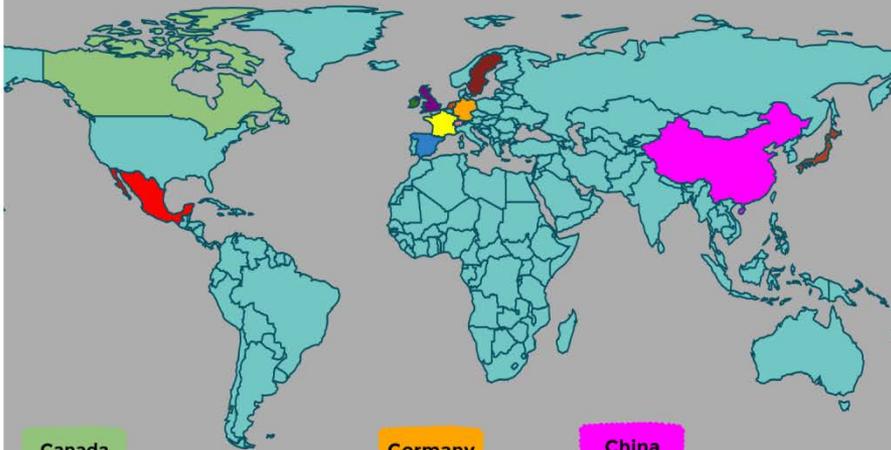


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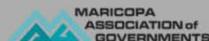


● GLOBAL SISTER CITIES/REGIONS OF INTEREST ●

AEROSPACE/AVIATION/AERONAUTICS **DRAFT**



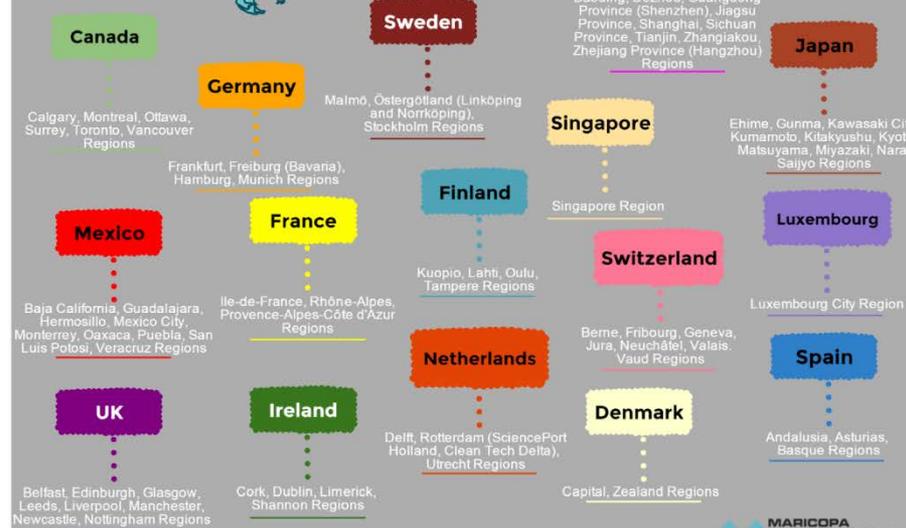
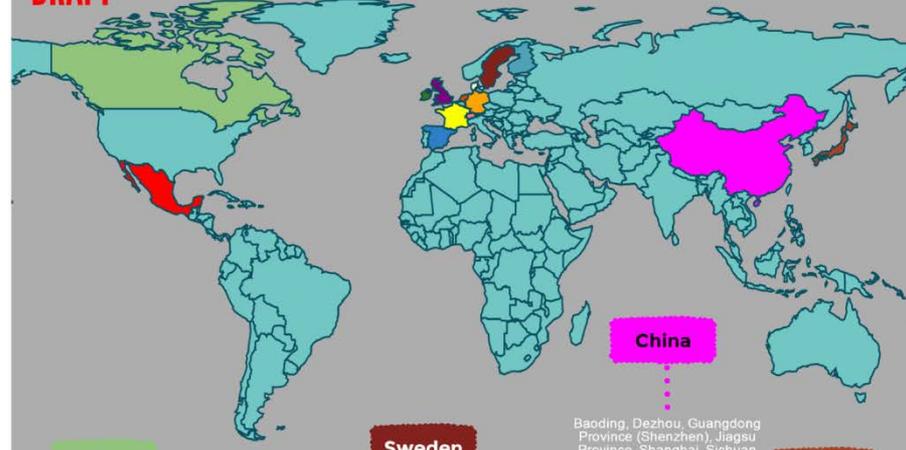
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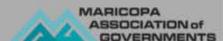
● GLOBAL SISTER CITIES/REGIONS OF INTEREST ●

CLEAN ENERGY/TECHNOLOGY

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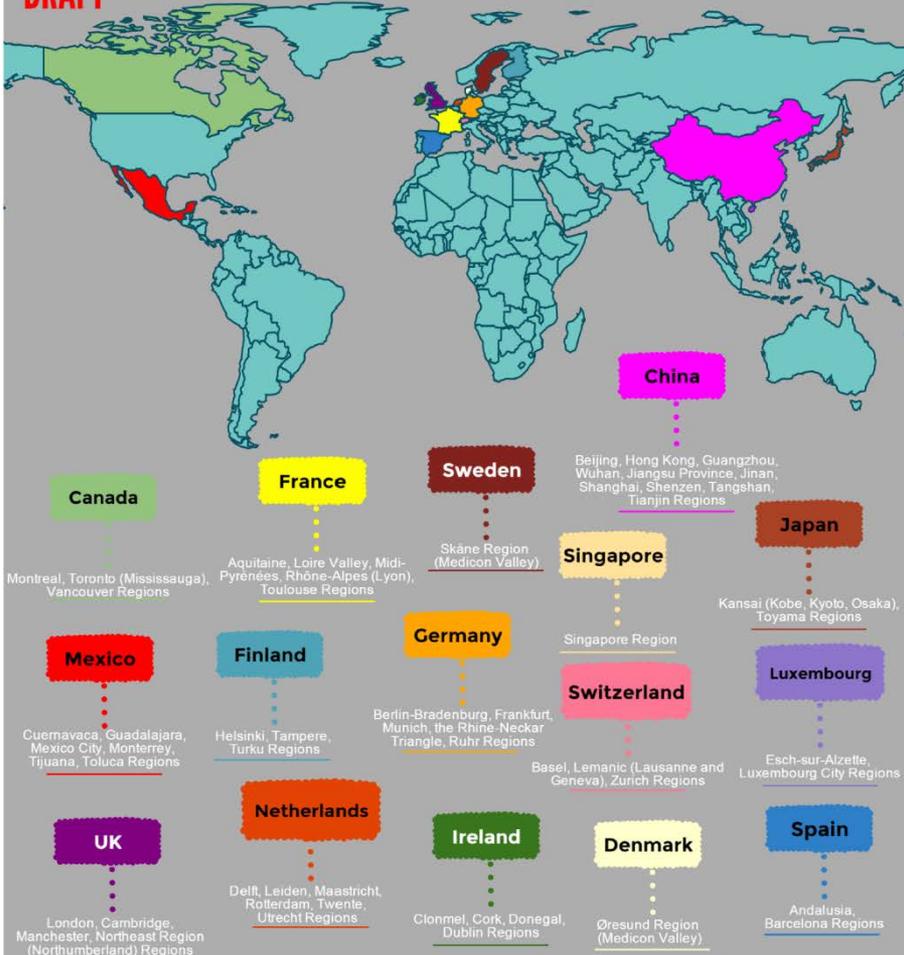
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GLOBAL SISTER CITIES/REGIONS OF INTEREST

HEALTHCARE/SPECIALTY PHARMA

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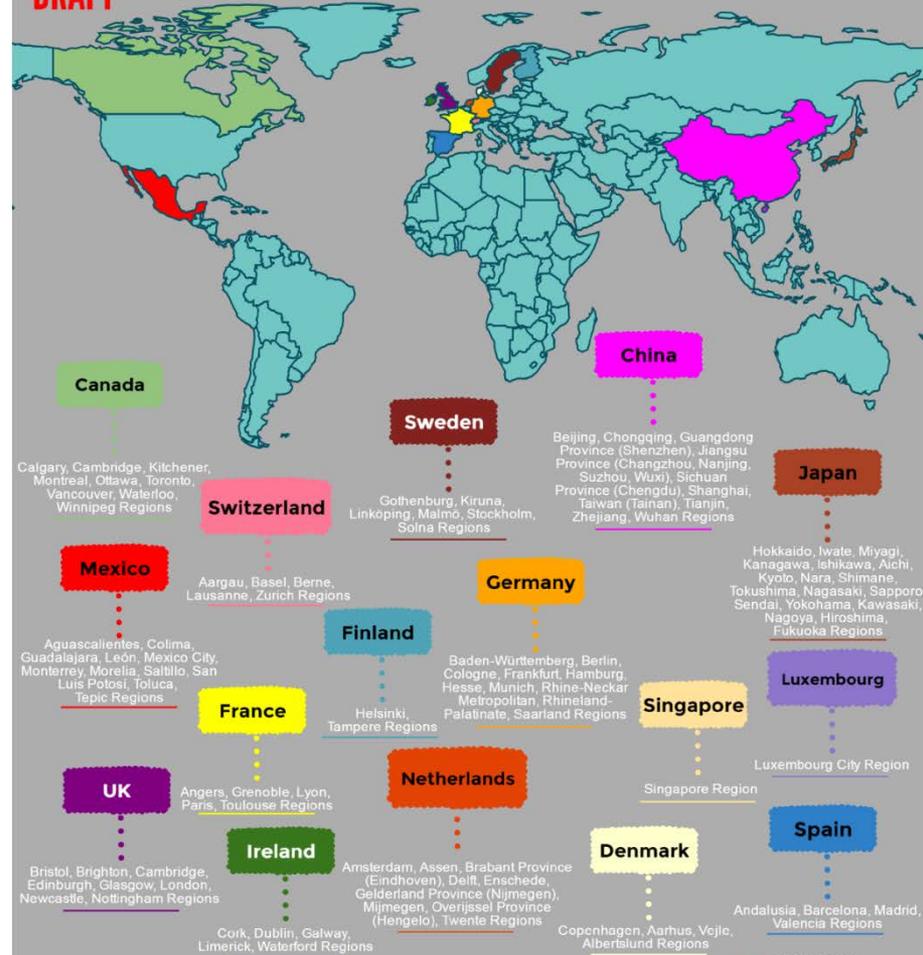
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GLOBAL SISTER CITIES/REGIONS OF INTEREST

HIGH TECH

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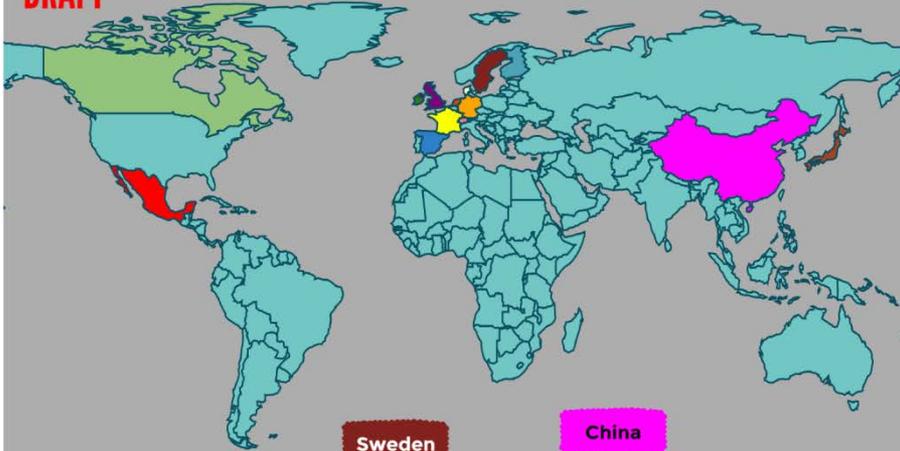
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GLOBAL SISTER CITIES/REGIONS OF INTEREST

INNOVATION/ENTREPRENEURSHIP

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Canada

Calgary, Montreal, Toronto, Vancouver, Waterloo Regions

Sweden

Blekinge, Stockholm, Skåne (Helsingborg, Lund, Malmö) Regions

China

Beijing, Guangzhou, Hunan, Shanghai, Shenzhen Regions

Japan

Kyoto, Osaka, Tokyo Regions

Switzerland

Berne, Geneva, Lausanne, Lucerne, St. Gallen, Zurich Regions

Finland

Helsinki, Tampere Regions

Singapore

Singapore Region

Germany

Baden-Württemberg, Berlin, Dresden, Hannover-Hesse, Karlsruhe/Freiburg, Mannheim, Stuttgart Regions

Luxembourg

Luxembourg City Region

Mexico

Cuernavaca, Guadalajara, Mexico City, Monterrey, Oaxaca, Puebla, Querétaro Regions

Denmark

Capital, Central Denmark, South Denmark Regions

France

Aquitaine, Grenoble, Marseilles, Paris, Rhône-Alpes (Lyon), Toulouse Regions

Netherlands

Amsterdam, Eindhoven, Utrecht Regions

Spain

Aragon, Asturias, Barcelona, Basque, Castile and Leon, Galicia, Madrid Regions

UK

Birmingham, Cambridge, Leicester, London, Newcastle, Nottingham, Manchester Regions

Ireland

Cork, Dublin, Galway, Limerick, Waterford Regions

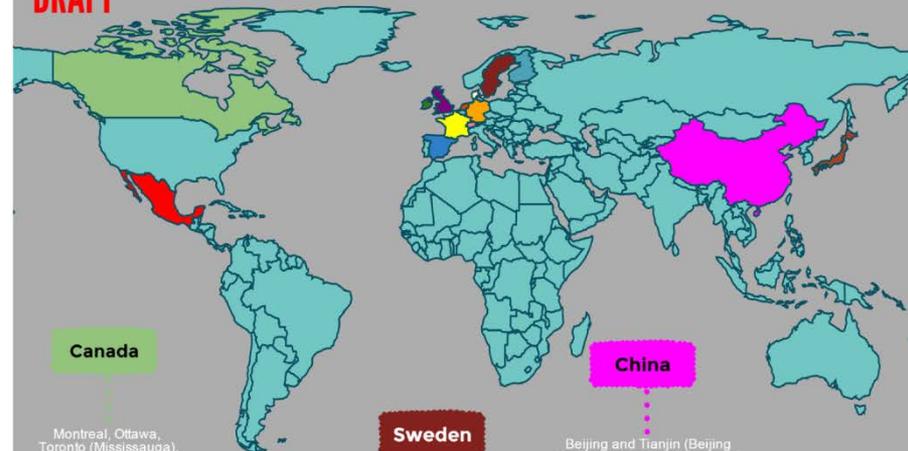
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GLOBAL SISTER CITIES/REGIONS OF INTEREST

LIFE SCIENCES/BIOTECH

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Canada

Montreal, Ottawa, Toronto (Mississauga), Vancouver, Winnipeg Regions

China

Beijing and Tianjin (Beijing cluster), Chengdu, Chongqing and Xi'an (Central cluster), Shanghai, Suzhou Wuxi (Yangtze River Delta cluster), Shenzhen, Guangdong, and Hong Kong (Pearl River Delta South cluster) Regions

Sweden

Skåne Region (Medicon Valley)

Switzerland

Basel, Biel/Bienne, Lemanic (Lausanne and Geneva), Winterthur and Zurich Regions

Japan

Kansai (Kobe, Kyoto), Shiga, Mie Valley, Nara, Keihanna, North Osaka Regions

Mexico

Baja California (Mexicali, Tijuana), Baja California Sur, Chihuahua, Mexico City, Jalisco (Guadalajara), Nuevo Leon, Quintana Roo, Sonora (Hermosillo, Guaymas), Tamaulipas and Yucatan (Veracruz) Regions

Germany

Freiburg, Lorrach, Munich, Offenburg, Ulm (BioRegion), Waldshut Regions

Finland

Helsinki, Kuopio, Oulu, Tampere, Turku Regions

Singapore

Singapore Region

France

Alsace, Bretagne, Languedoc Nord-Pas de Calais, Paris, Provence-Alpes-Cote d'Azur, Roussillon Regions

Spain

Andalusia, Basque Regions

UK

Belfast, Birmingham, Bristol, Cambridge-London-Oxford, Edinburgh, Kent, Liverpool, Manchester, Nottingham Regions

Ireland

Dublin Region

Netherlands

Amsterdam, Arnhem, Braineport/Eindhoven, Delft, Leiden, Maastricht, Nijmegen, Twente, Utrecht Regions

Denmark

Øresund Region (Medicon Valley)

Luxembourg

Esch-sur-Alzette, Luxembourg City Region

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