



# Crash Course on the Site Selection Process



**GLS** GLOBAL LOCATION STRATEGIES®

x



**STRATA**  
PLATFORMS



# + Your Speakers



**DIDI CALDWELL**  
President + CEO  
Global Location Strategies



**KORNELIA KOSTKA**  
Product Manager  
Strata Platforms



- 72 of world's largest technology companies are headquartered in the United States
- The US has gone from a net energy importer to the largest energy producer in the world in a decade
- Among advanced economies, the US has the most dynamic geographic structure in large part because of immigration





## Reindustrialization of the Americas

*“North America will need to double its industrial plant in the next 5-10 years, and much of that will be front-loaded.”*

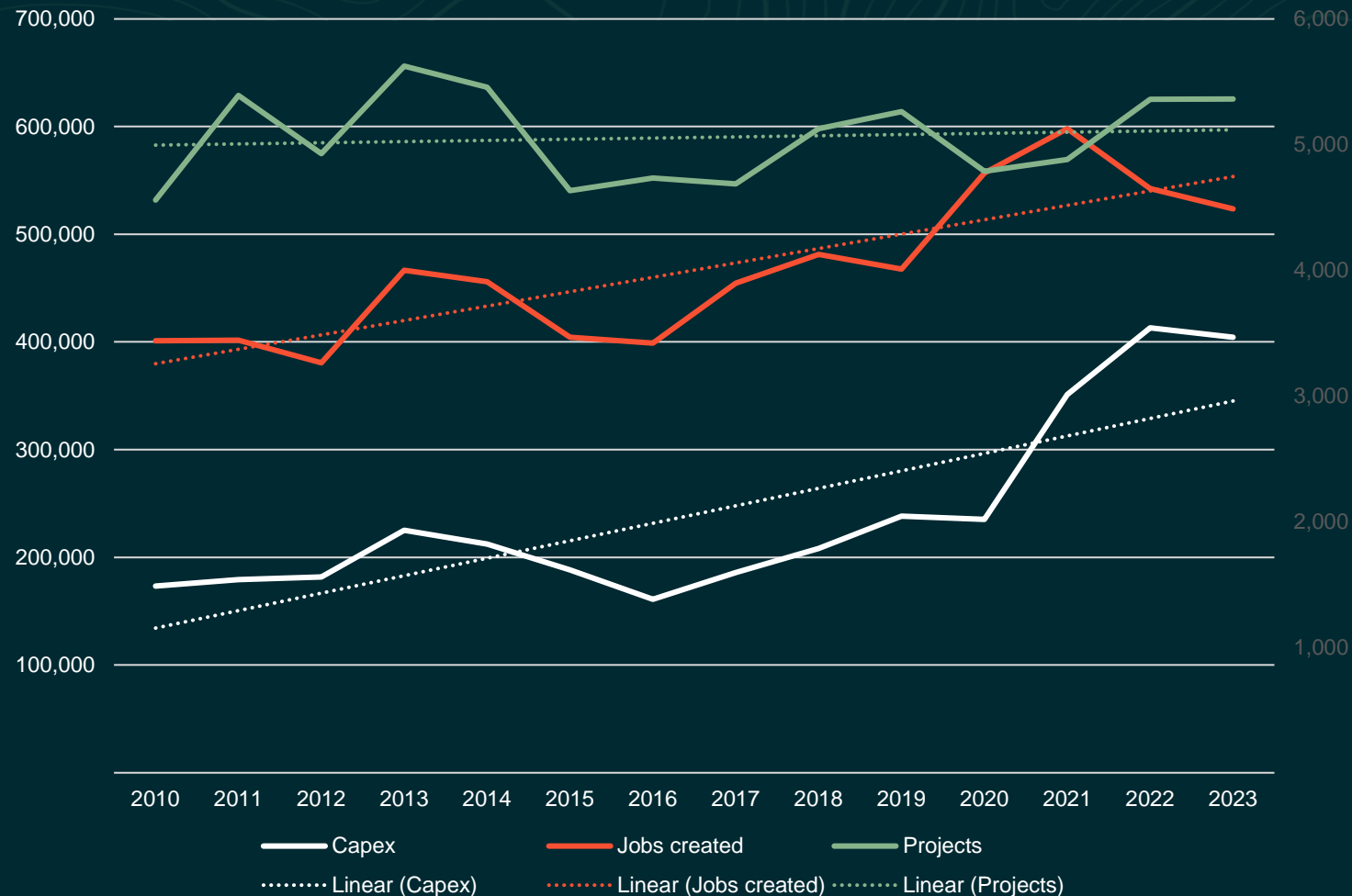
- Peter Zeihan



# Announced Projects United States

2010 - 2023

Source: FDI Markets

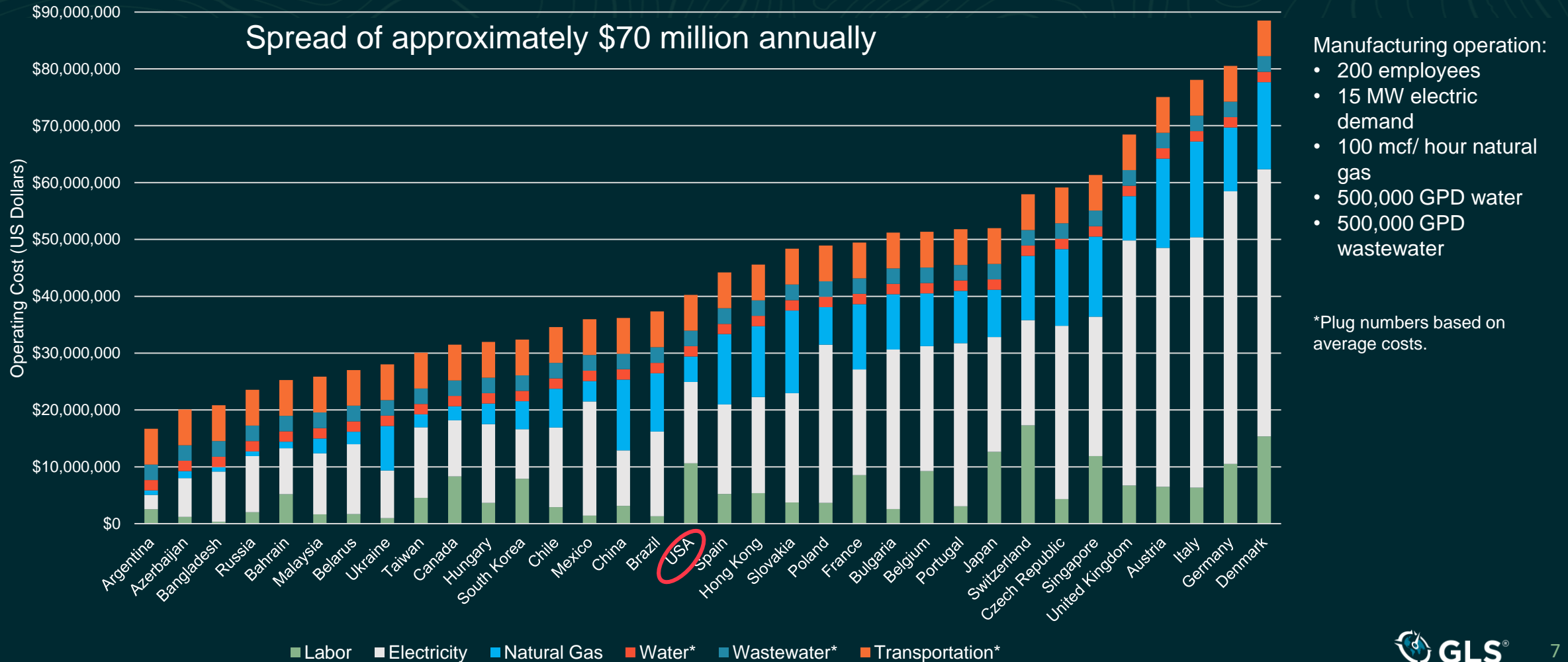


- The number of projects announced has stayed flat at around 5000 per year
- The number of jobs created has grown from around 400,000 in 2010 to a high of nearly 525,000 in 2023
- The total announced capex has gone from less than \$200 billion annually from 2010-2018 to a high of over \$400 billion in 2022 and 2023.
- Capex and jobs were down slightly in 2023 from 2022 levels (-2.1%, and -3.5% respectively), while number of projects was essentially flat.



# Location Dependent Operating Costs

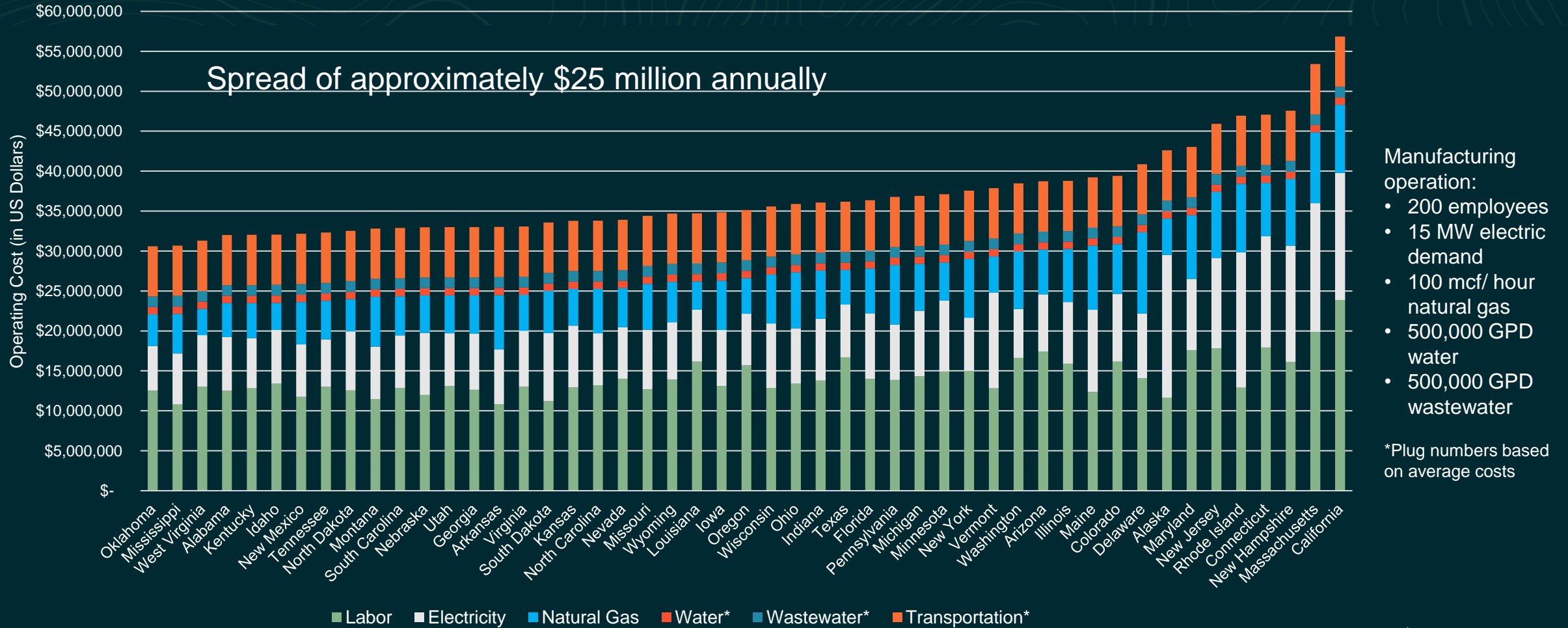
Source: GlobalPetrolPrices (electric and natural gas rates for business from Dec 2021), Take-profit.org (monthly wages)





# Location Dependent Operating Costs

Source: US EIA, BLS, GLS





# Challenges in Today's ED Climate

01

## SITES

- Dwindling inventory
- High activity levels
- Long lead time

02

## ENERGY

- Strained infrastructure capacity
- Transformer delays
- High demand for renewables

03

## LABOR

- Low unemployment
- Low participation
- Aging workforce





# Case Study



# Case Study

WHAT YOU SHOULD HAVE KNOWN

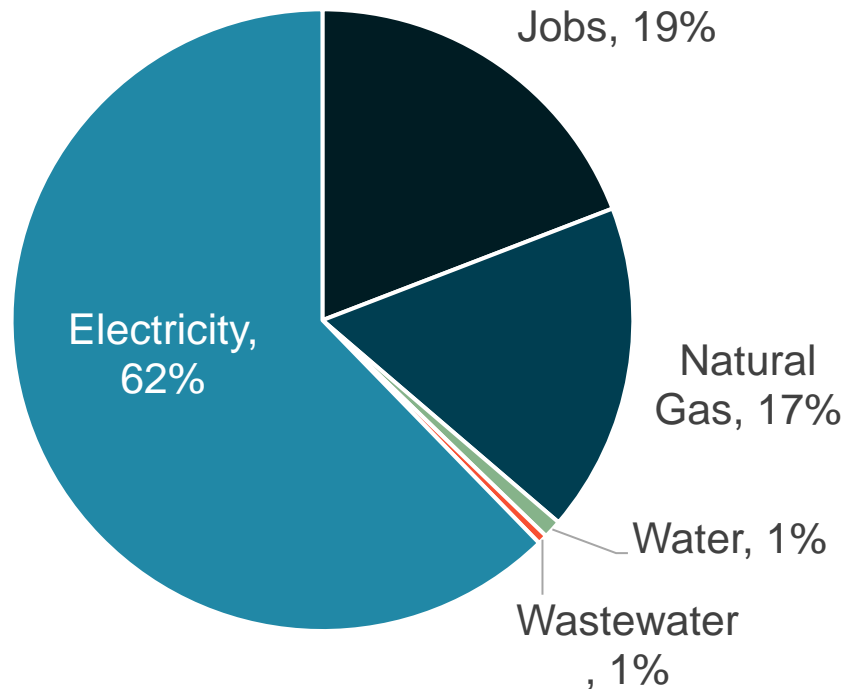
Requirements	Cumulative
Capital Investment	\$2 B+
Direct Employment	800
Site Size Required	1,000 acres
Zoning	Industrial
Electrical Operating Load	>200 MW
Natural Gas	> 500 MCF/ hr. Peak > 1000 MCF/ hr.
Water	> 1 MGD
Sewer	Moderate User
Logistics	Heavy Truck Rail Required

- Big project: Likely to have a lot of ED interest
- Capital-Intensive: \$2.5 MM invested per 1 job created
  - Likely focus on ability to meet technical and permitting requirements
- Significant acreage and utility requirements
  - Unlikely to be many feasible location options

# Case Study

WHAT YOU SHOULD HAVE KNOWN

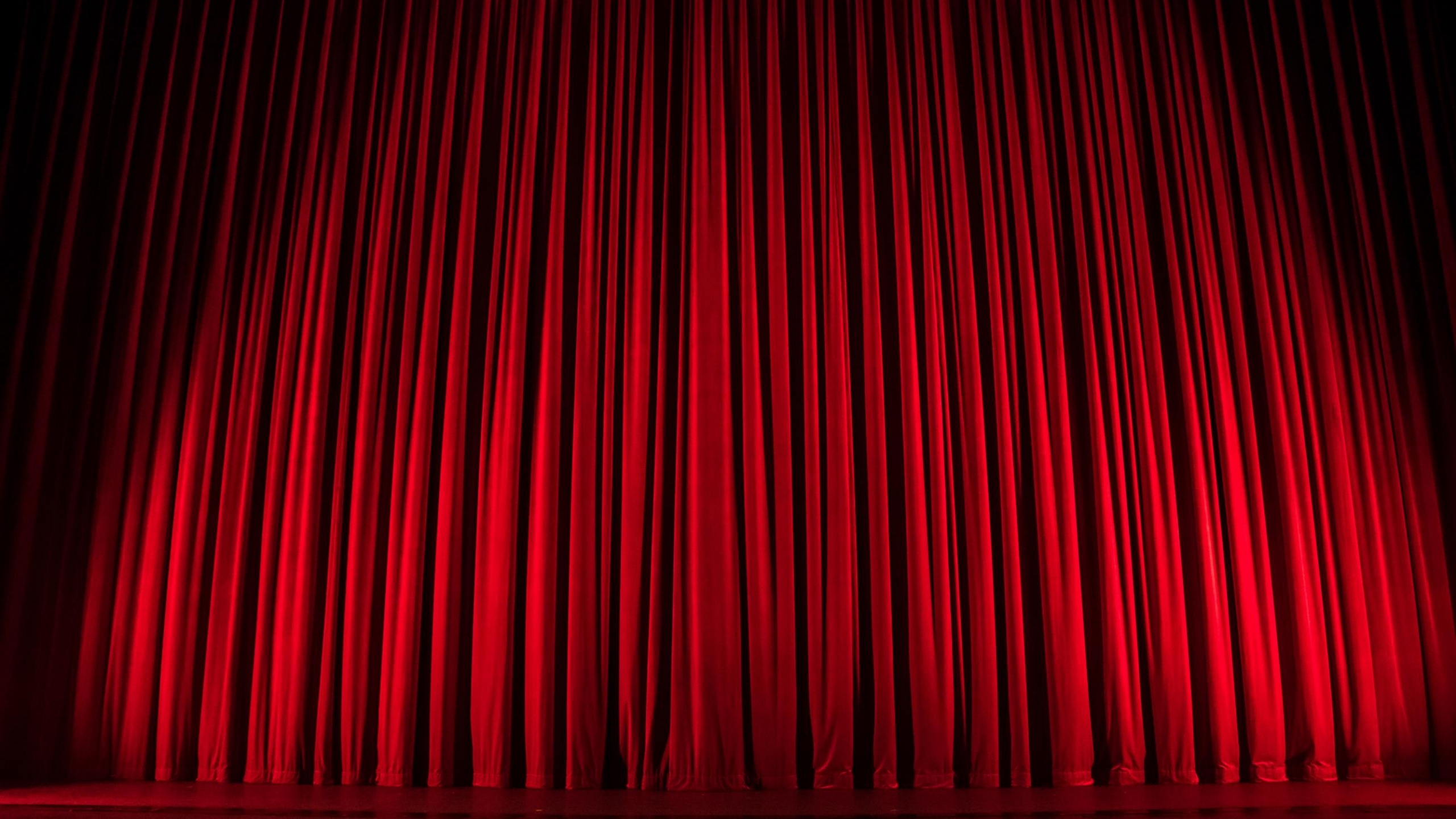
Average Distribution of Location-Dependent Costs



## Annual cost impacts

- 1 cent per KWh  $\approx$  \$18 MM
- \$1 per MCf  $\approx$  \$6 MM
- \$1 per hour  $\approx$  \$1.65 MM
- \$1 per 1000 Gallons water  $\approx$  \$400K
- \$1 per 1000 Gallons wastewater  $\approx$  \$150K





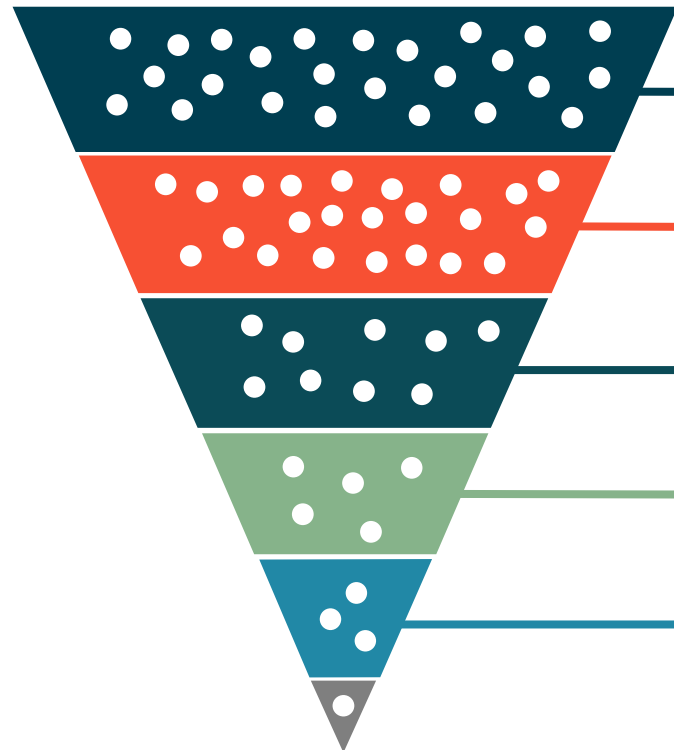
# Balancing Quality, Cost, and Risk

OPTIMIZING ON THE TRADE-OFFS





# Site Selection Process



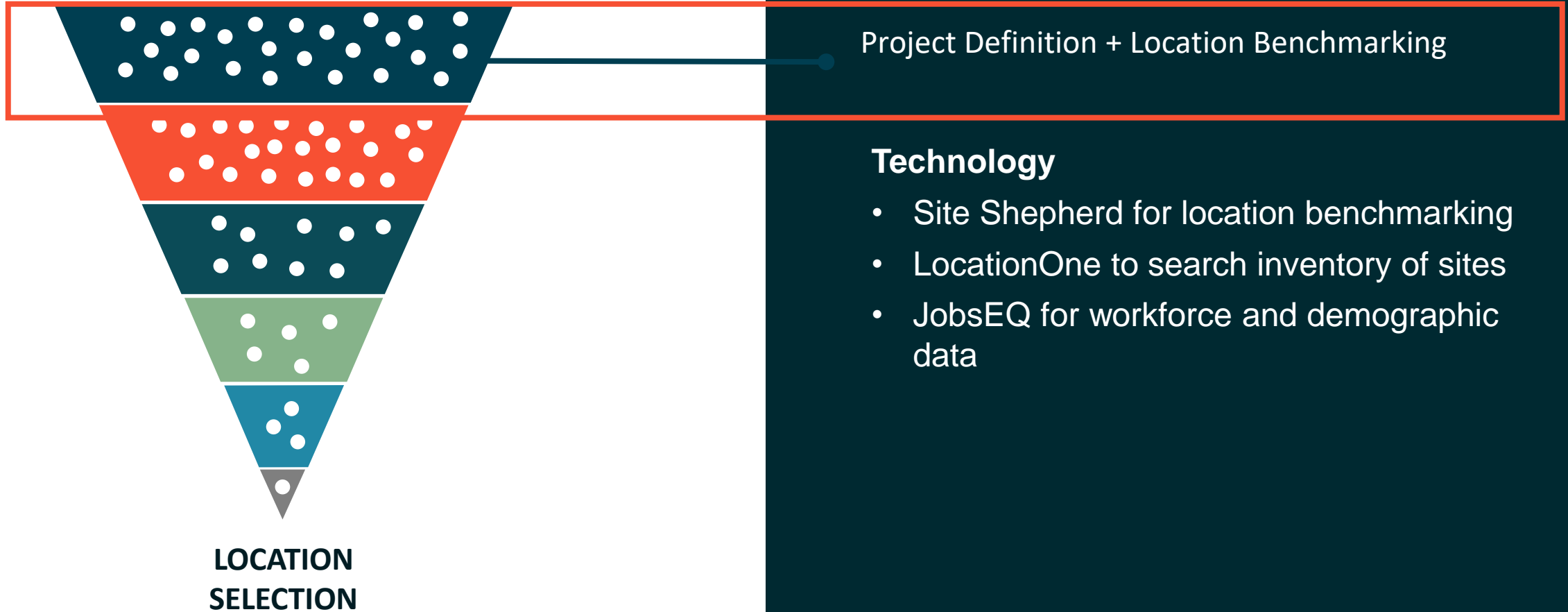
**LOCATION  
SELECTION**

## A TYPICAL GLS SITE SELECTION APPROACH

- Project Definition + Location Benchmarking
- Site Identification + Desktop Evaluation
- Virtual Site Visits
- Field Visits + Detailed Evaluations
- Incentive Negotiations + Due Diligence

# Site Selection Process

A TYPICAL GLS SITE  
SELECTION APPROACH





# Case Study

WHAT YOU DIDN'T KNOW



**10 States Defined as Search Region**



UNITED STATES

# Best Places for Primary Metal Manufacturing

2024 GLS INSIGHTS REPORT

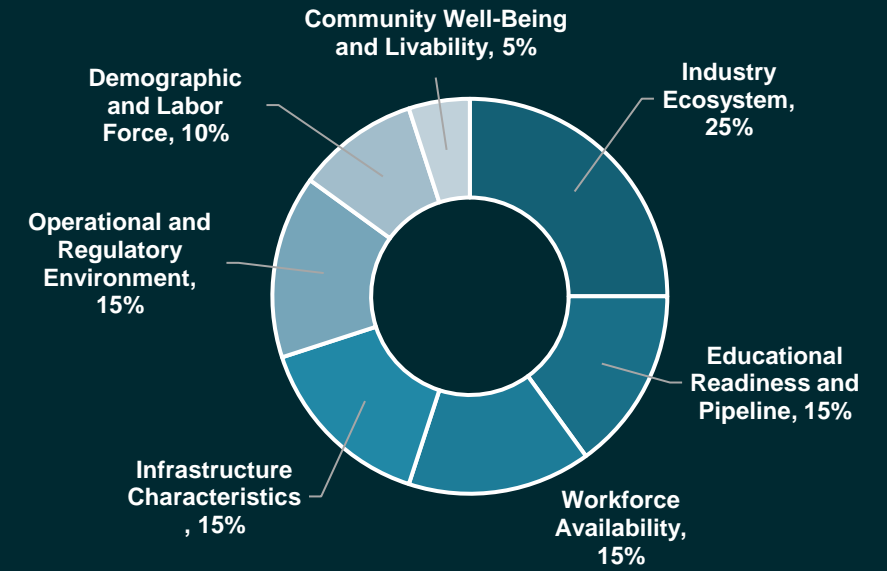


# Best Places for Primary Metal Manufacturing

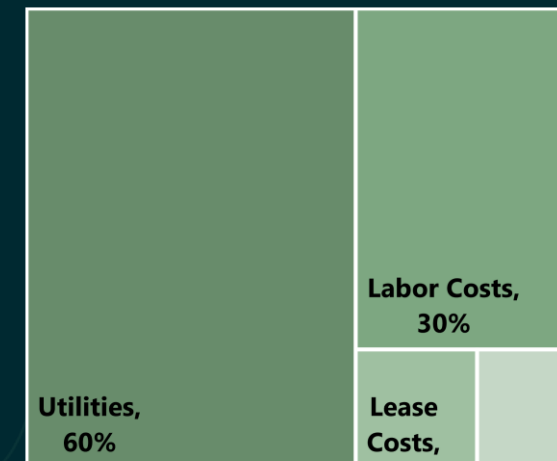
## Primary Metal Manufacturing Project Profile

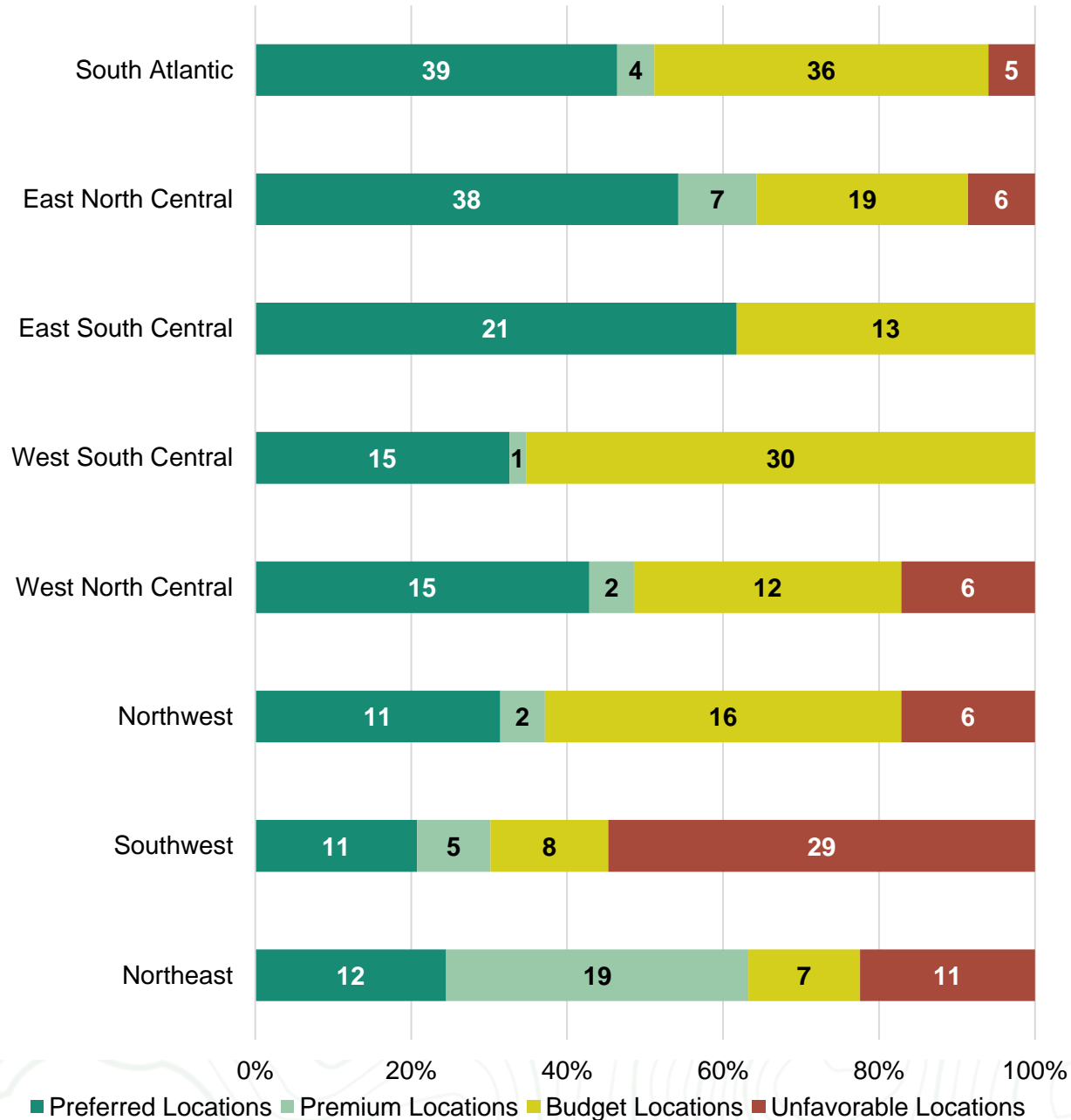
<b>REAL ESTATE</b>	<b>350K SF Building</b>	<b>500 Acres</b>		
<b>INITIAL INVESTMENT + EMPLOYMENT</b>	<b>\$300MM Capital Investment</b>	<b>200 Employees</b>		
<b>FINANCIALS</b>	<b>\$200MM Revenue</b>	<b>10% Earnings Before Taxes</b>		
<b>UTILITY DEMANDS</b>	<b>45 MW Electric Load Factor 0.90</b>	<b>50 MCFh Natural Gas</b>	<b>250K GPD Water</b>	<b>200K GPD Wastewater</b>

## Primary Categories and Weights

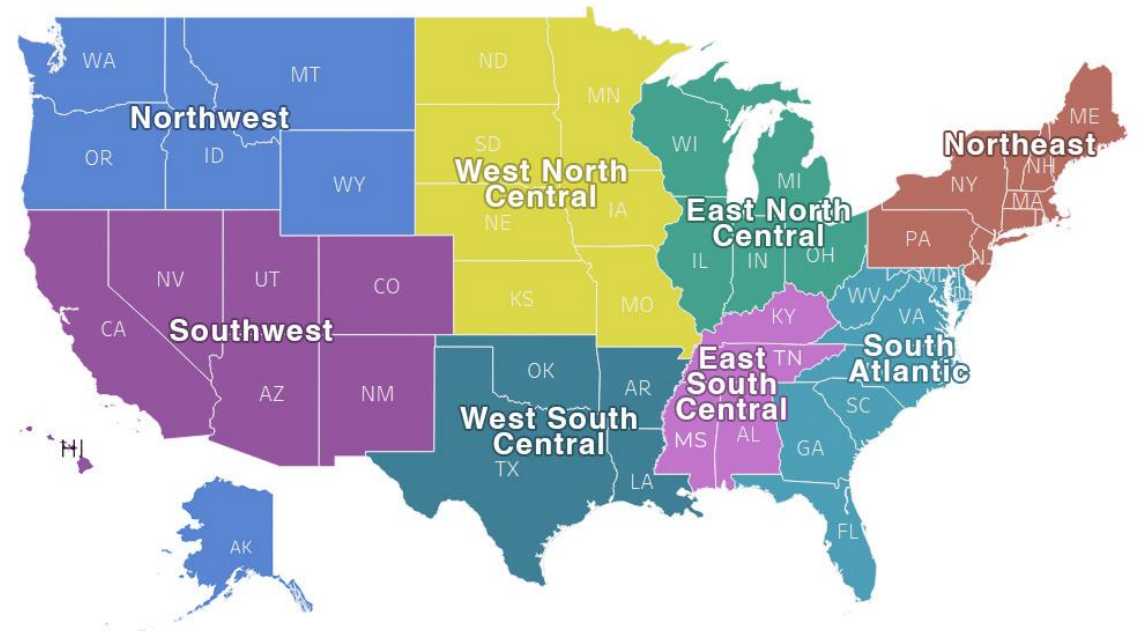


## Location-Dependent Operating Cost Distribution



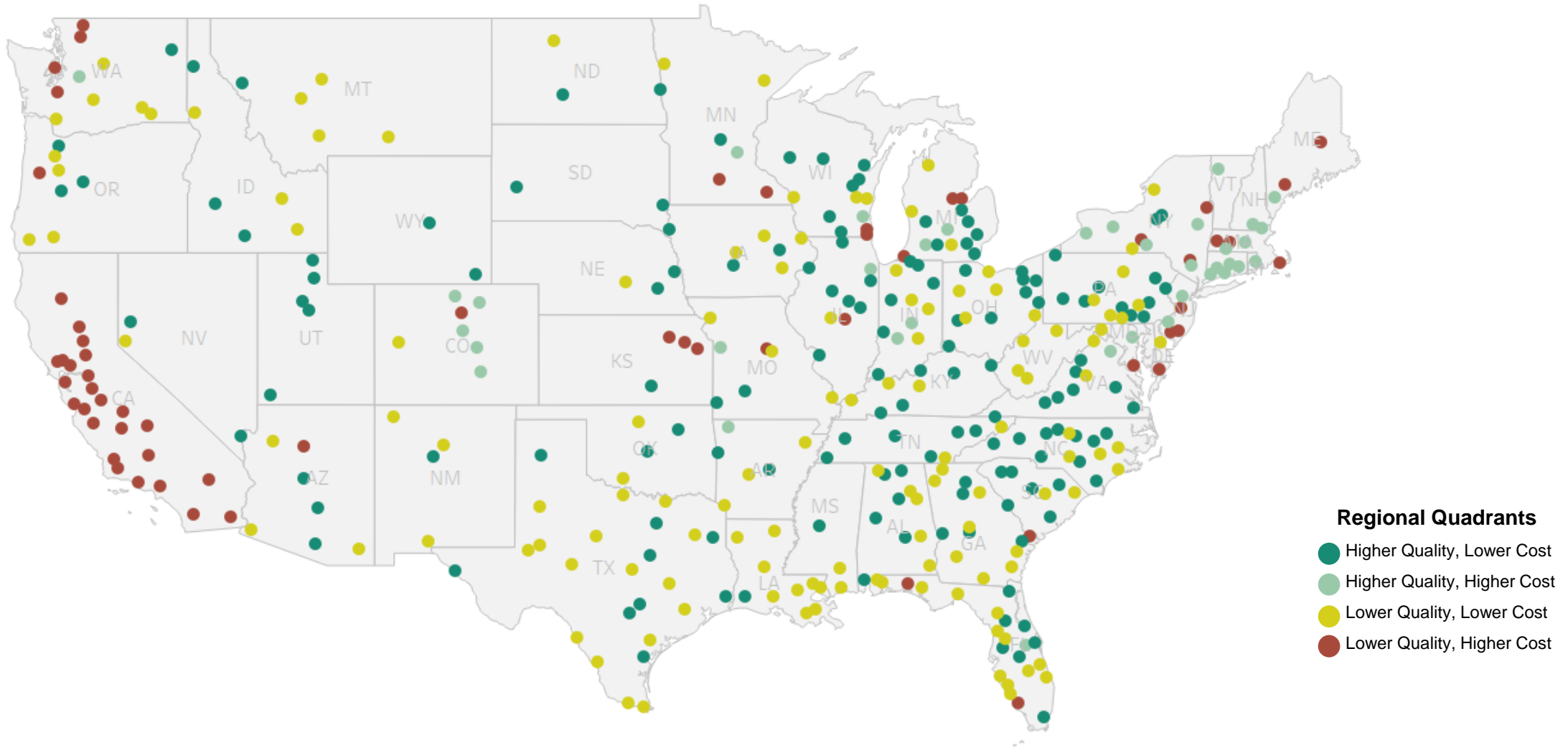


**Composite Chart Metros Distribution by Region**





## + Composite Model National Quadrant Map



# primary metal manufacturing

BEST OF THE REGION: EAST SOUTH CENTRAL



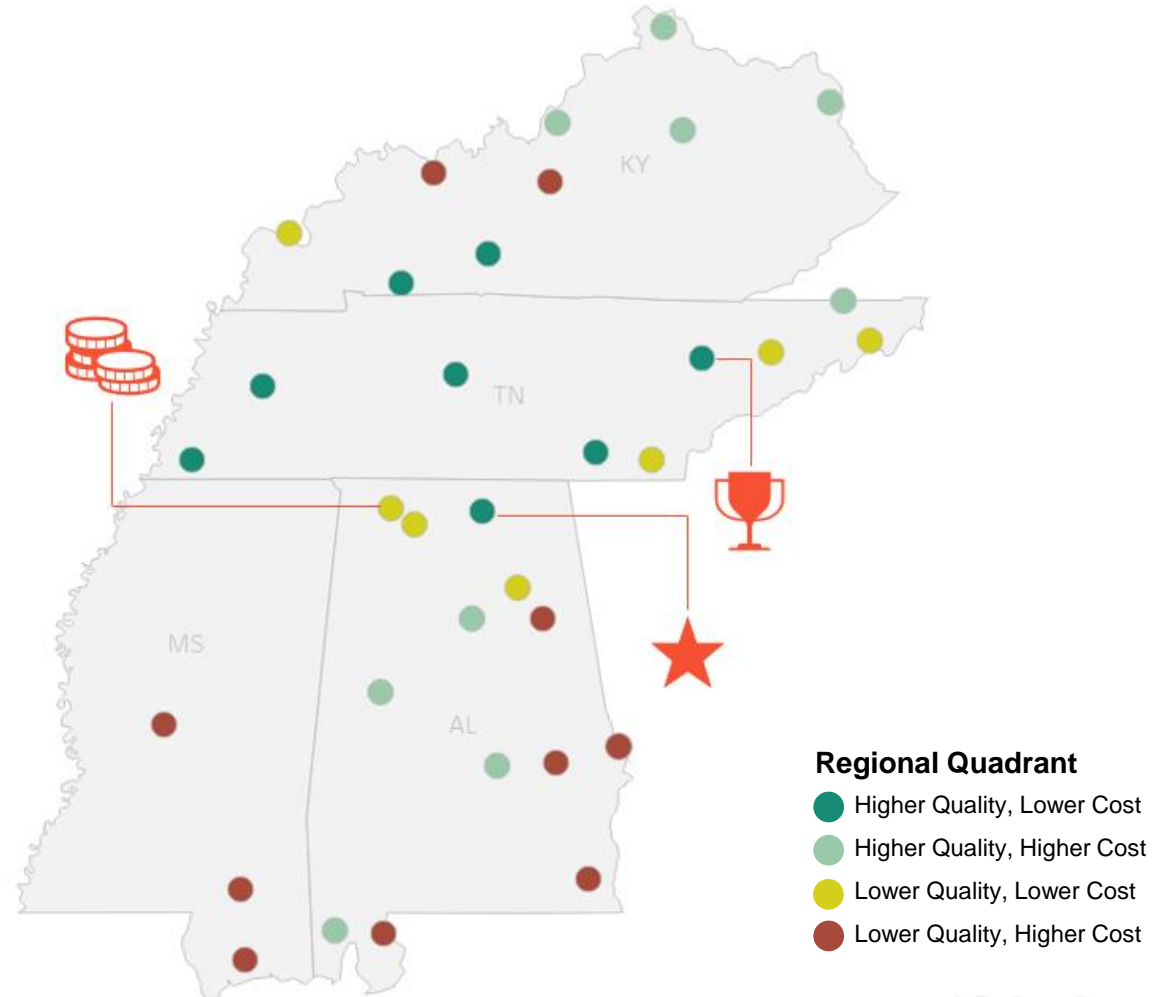
TOP PERFORMING  
Knoxville, TN



HIGHEST QUALITY  
Huntsville, AL



LOWEST COST  
Florence-  
Muscle Shoals,  
AL





Showing 48 of 48 sites by Acres High ▾

Add All To Folders Remove All From Folders

**Chatham-Siler City Advanced Manufacturing Site**  
Siler City, NC  
1,800 Acres

**Mid-Atlantic Advanced Manufacturing Center (MAMaC)**  
Emporia, VA  
1,550 Acres

VIDEOS

**I-77 International Megasite**  
SC  
1,500 Acres

ACT Work Ready Communities

**Georgia Breakbulk Logistics Park (TRP) (Break Bulk Site)**  
Brunswick, GA  
1,431 Acres

TOUR

**Central SC Megasite**  
Jugoff, SC  
1,426 Acres

ACT Work Ready Communities

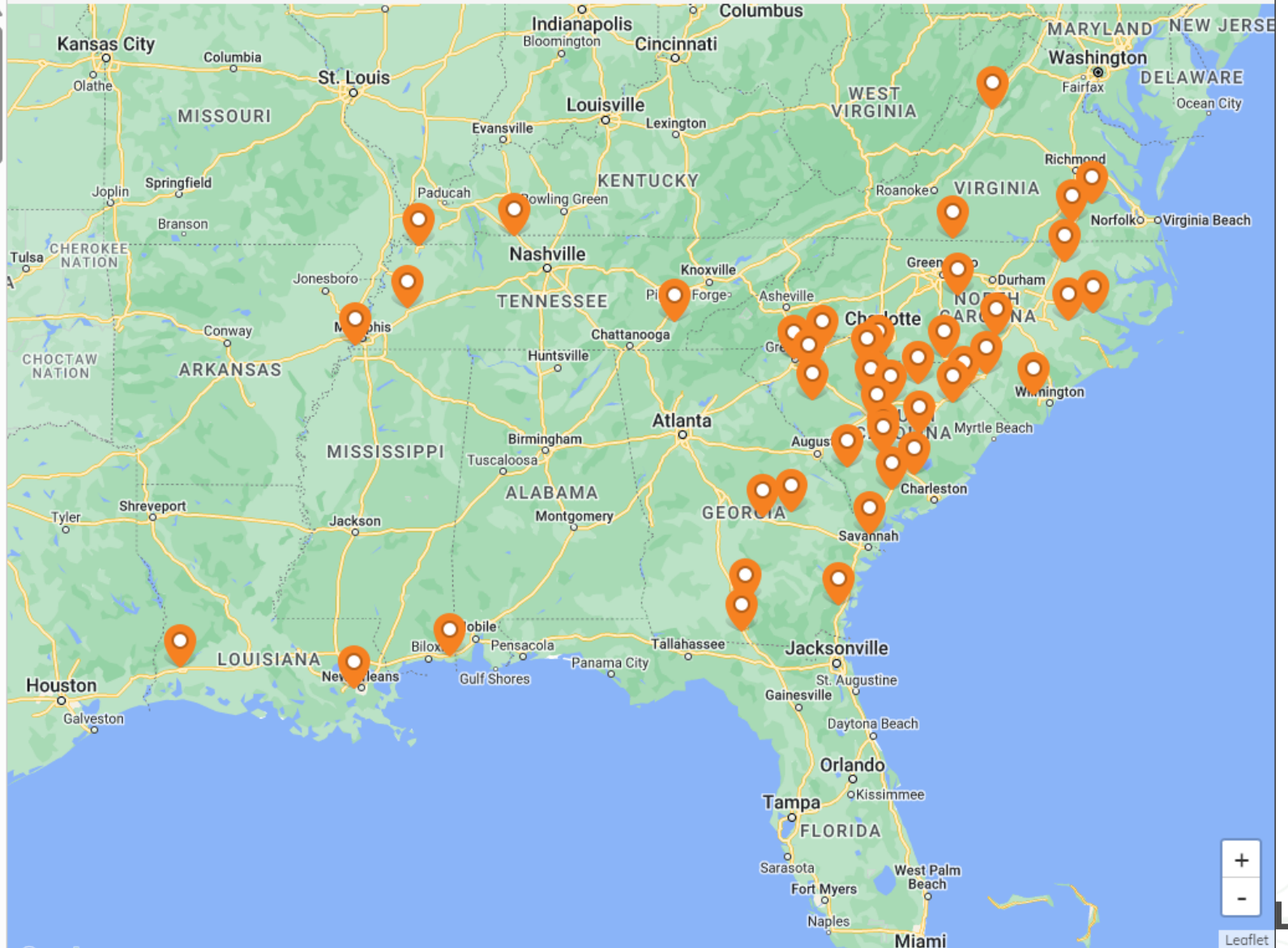
**Sussex Megasite**  
Sussex, VA  
1,130 Acres

**The Carolinas I-95 Super Park**  
Dillon, SC  
1,100 Acres

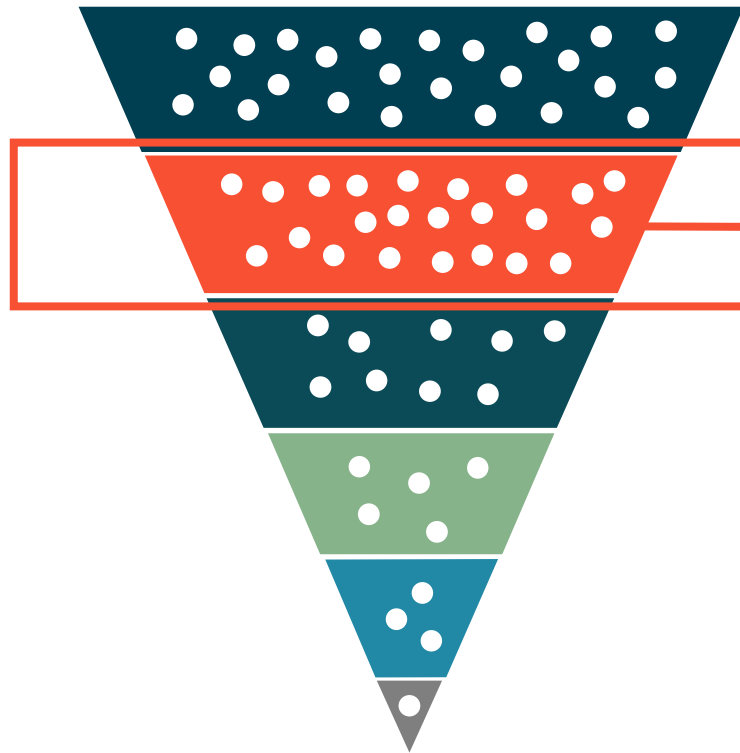
ACT Work Ready Communities

LAYERS DRAW HEAT MAPS MAP VIEWS MEASURE SHARE RESET

Applied Search: Showing: Project Raven, Project Monarch, Project Monarch - Additional Mobile Sites, Project Lloyd - AL x Width: mi. | Height: mi. | Area: sq. mi. Clear Search



# Site Selection Process



LOCATION  
SELECTION

A TYPICAL GLS SITE  
SELECTION APPROACH

• Site Identification + Desktop Evaluation

## Technology

- Lasso for RFI data collection
- Site Shepherd for cost and quality analysis
- JobsEQ for workforce and demographic data
- Geothinq for desktop GIS analysis



# Case Study

SEARCH REGION



**Sites Reviewed: 96**

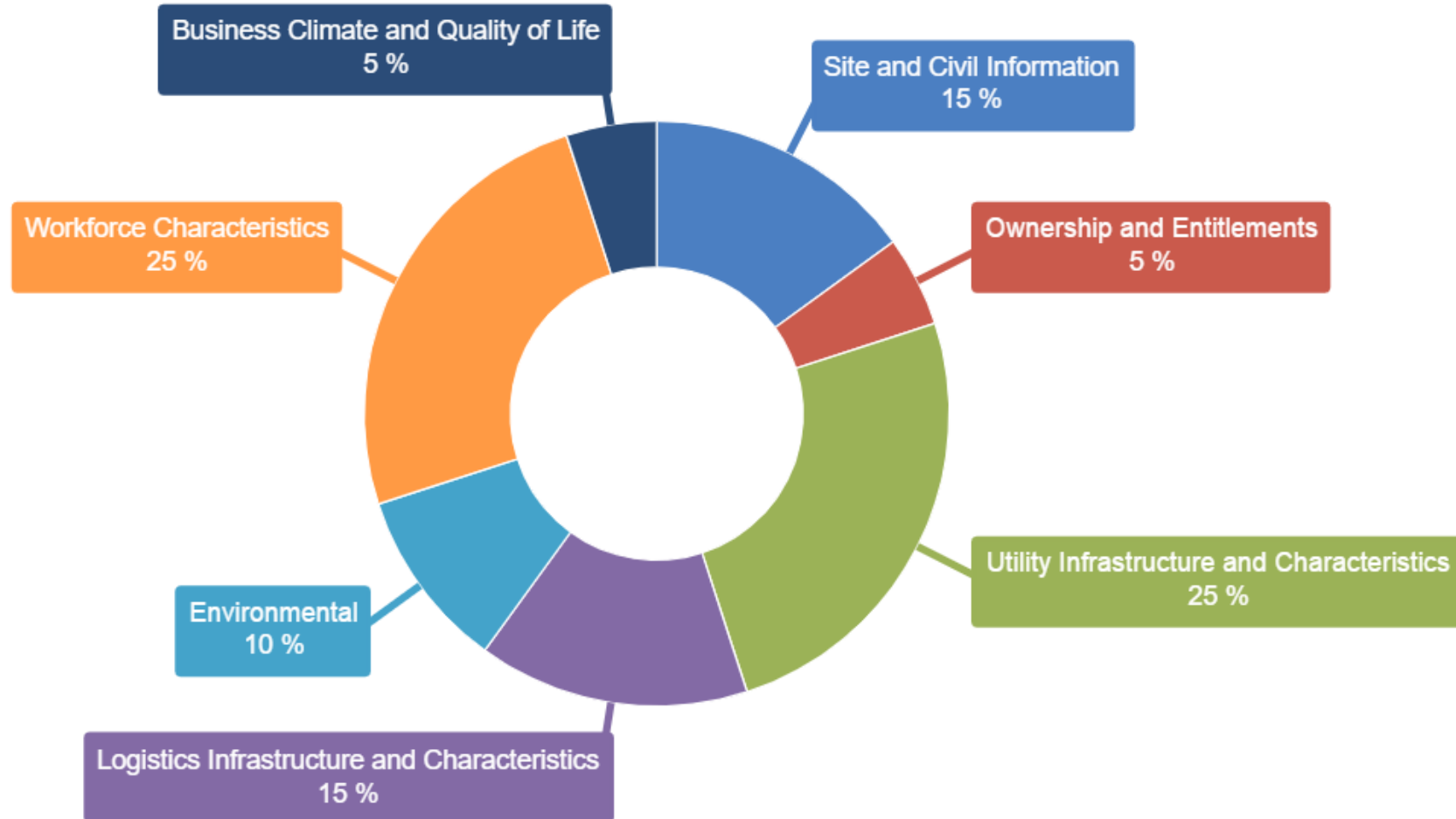
**Short-Listed: 14**

**Sites Profiled: 5**

- Minimum 500 acres
- Rail-served
- Ability to support 1,000 FTE
- 240+ MW, Fully-Renewable
- 650+ MCF/h
- Production Start 2.5 Years

# Case Study

PHASE 02 SITE IDENTIFICATION  
SITE-DEPENDENT

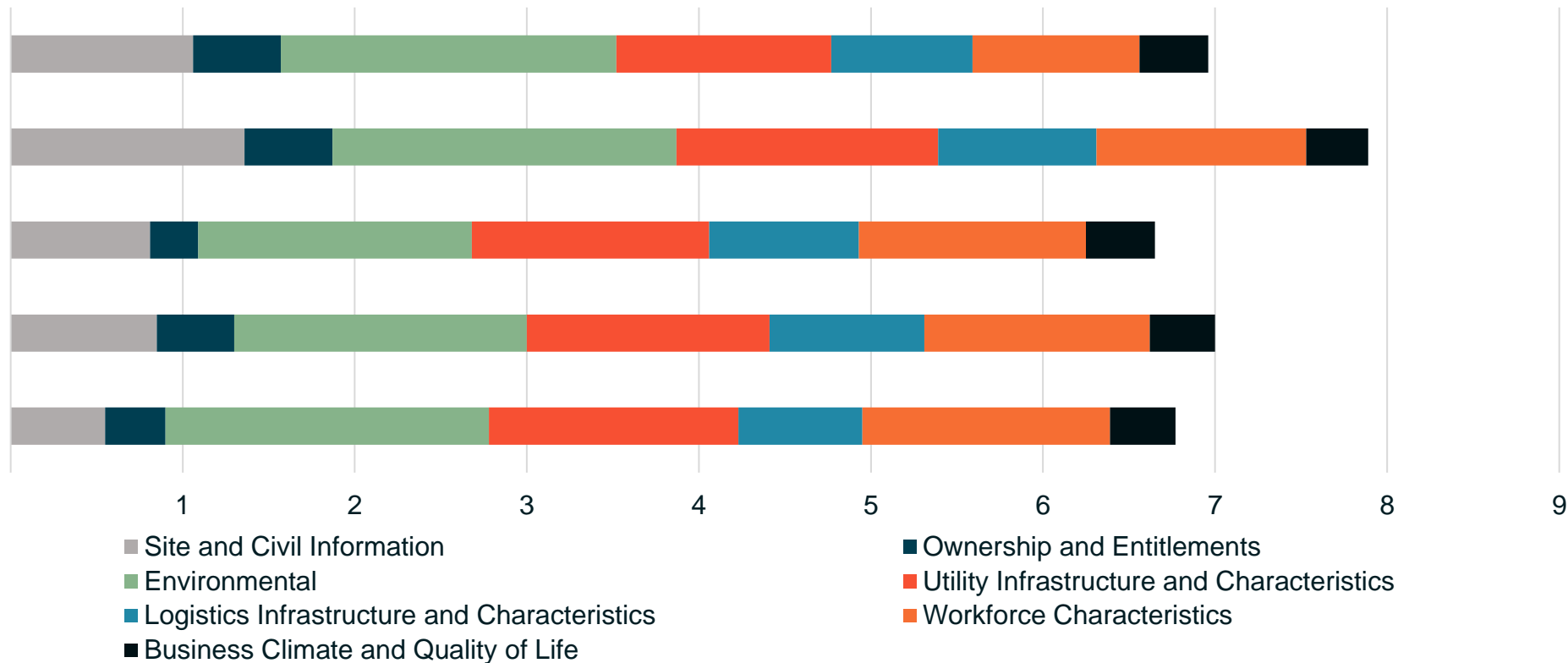




# Case Study

## PHASE 02 SITE IDENTIFICATION RESULTS

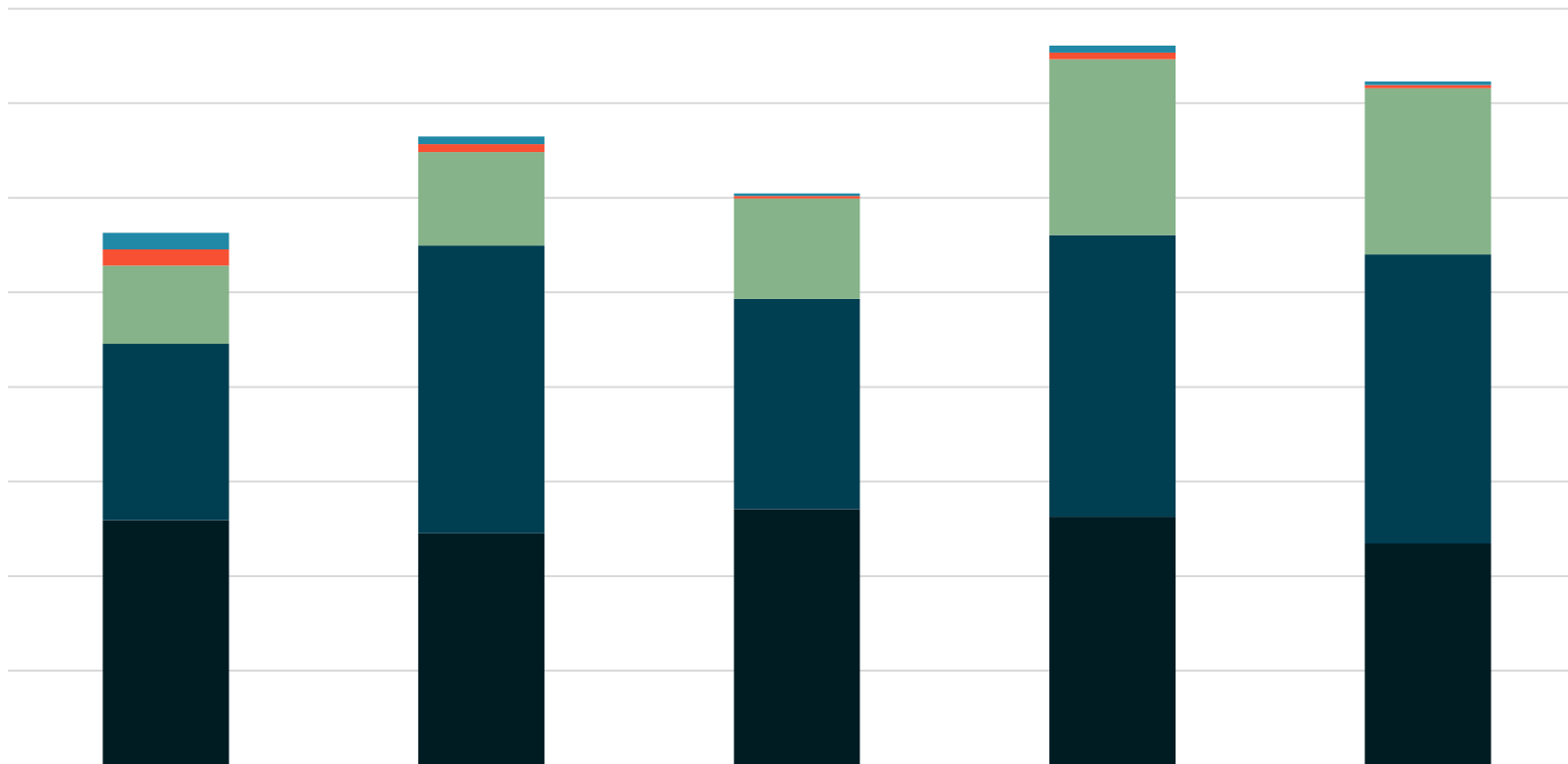
### Total Conditions Scoring Results



# Case Study

PHASE 02 SITE IDENTIFICATION RESULTS

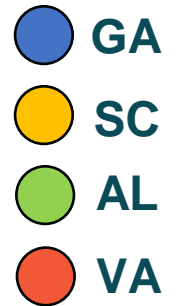
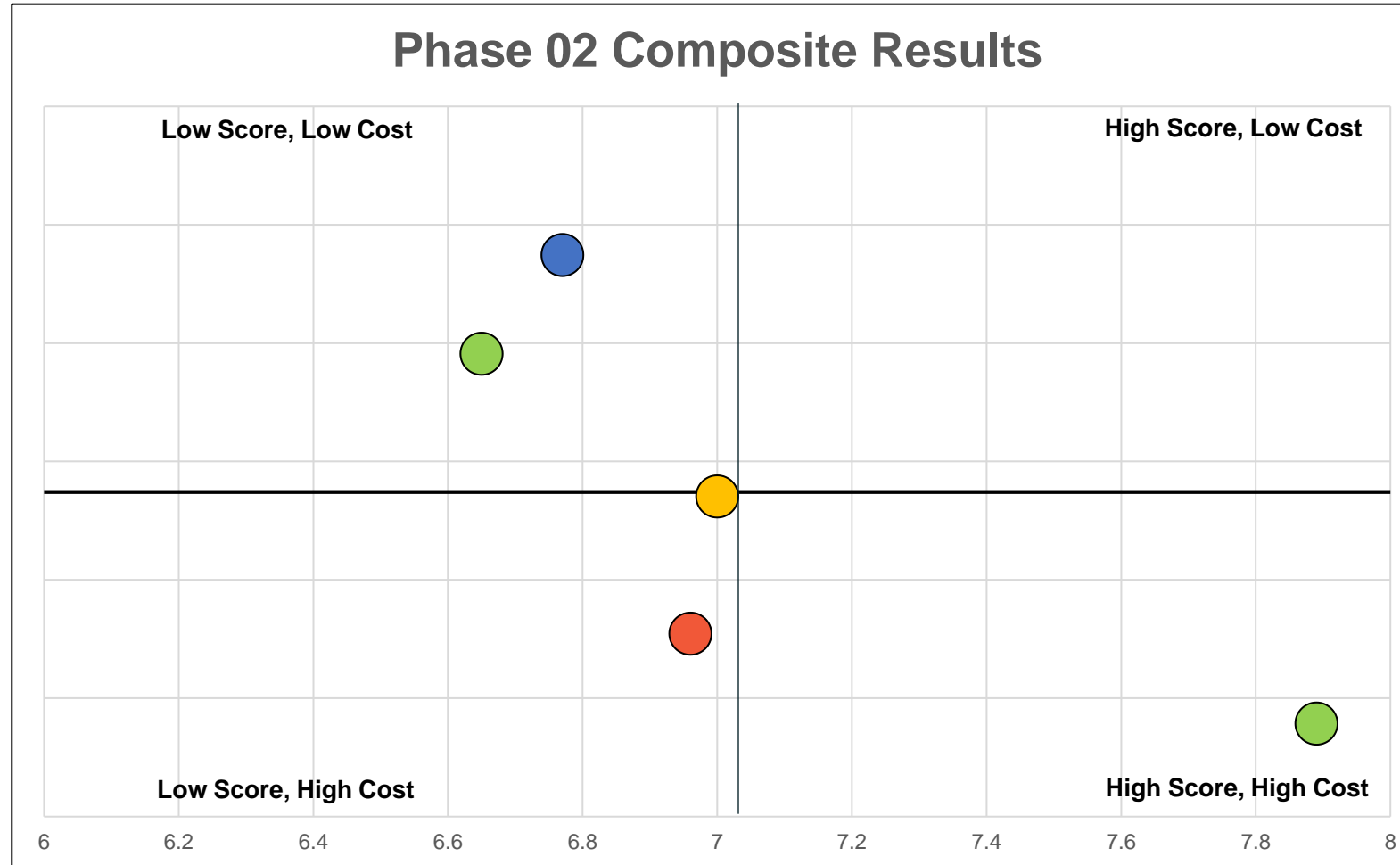
### Annual Operating Costs



■ Unburdened Payroll ■ Electricity ■ Natural Gas ■ Water ■ Wastewater

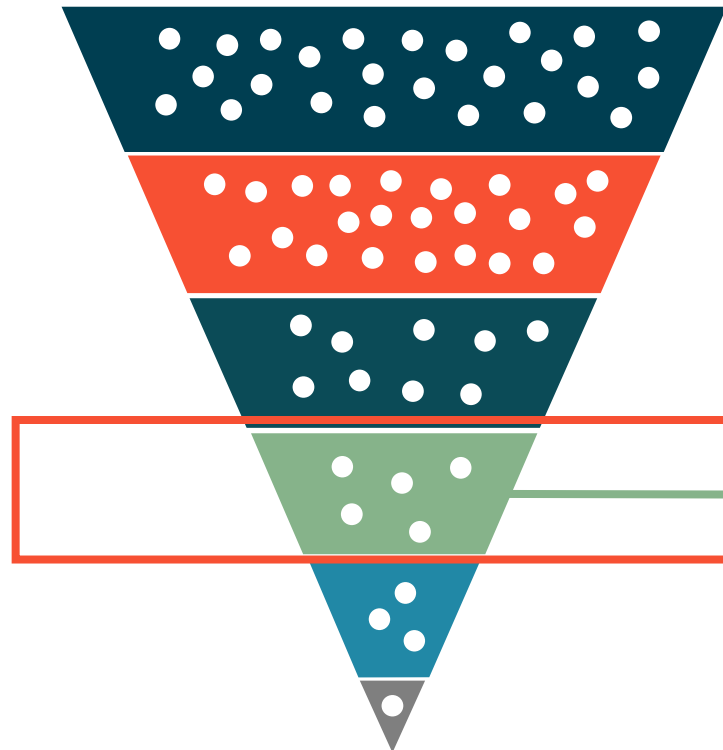
# Case Study

Submitted:  
5 sites  
4 states  
GA: 1  
SC: 1  
AL : 2  
VA:1





# Site Selection Process



**LOCATION  
SELECTION**

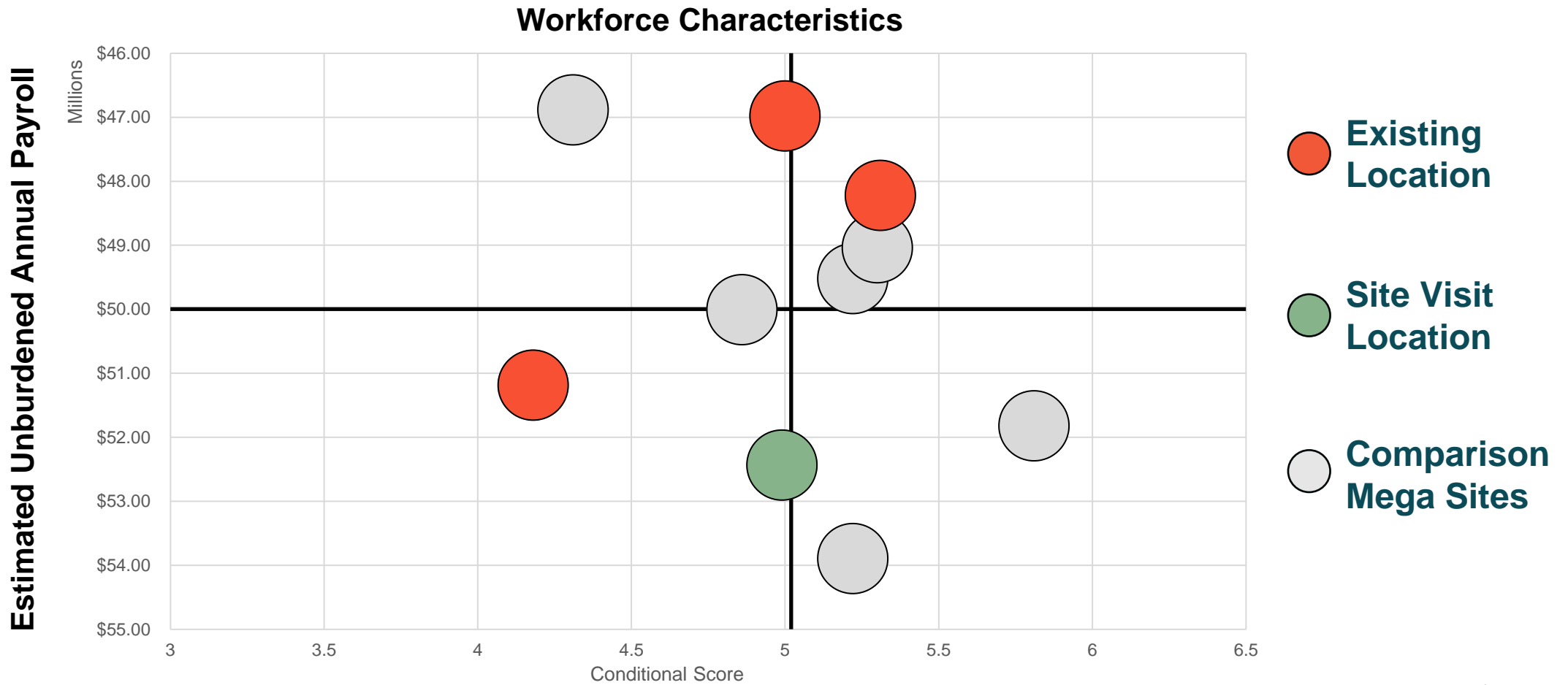
A TYPICAL GLS SITE  
SELECTION APPROACH

Field Visits + Detailed Evaluations

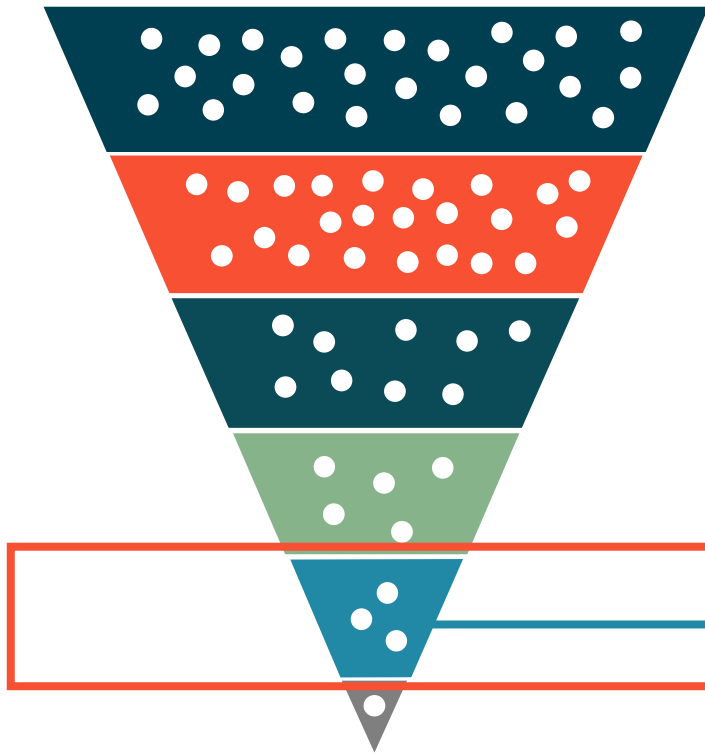
## Technology

- Site Shepherd for location benchmarking
- JobsEQ for drive-time workforce and occupational data
- Geothinq

# Case Study



# Site Selection Process



LOCATION  
SELECTION

A TYPICAL GLS SITE  
SELECTION APPROACH

Incentive Negotiations + Due Diligence

## Technology

- JobsEQ for workforce pipeline and labor risk analysis
- StageOne for desktop due diligence



MANUFACTURING

# Novelis plans \$2.5 billion Alabama aluminum mill with 1,000 jobs

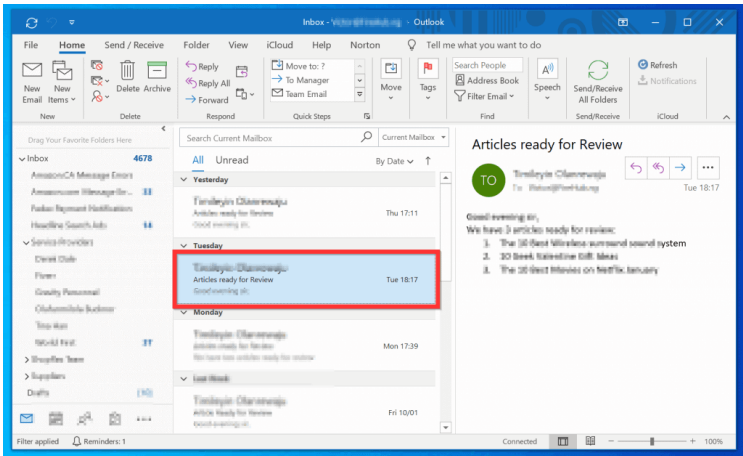






CRASH COURSE ON THE SITE SELECTION PROCESS

# How is technology changing the site selection process?





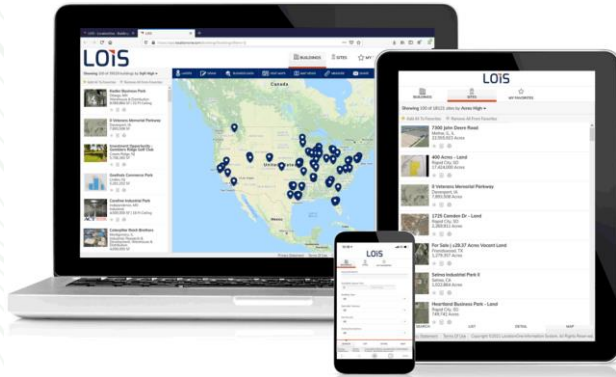
# Site Selection Technology Through the Years

	PRE-1990s	1990s	2000s	2010s	2020+
<b>CONTACTS</b>	Rolodex		E-Address Book	CRM / LinkedIn	
<b>REMOTE ACCESS</b>	Payphone/ Pager	Dumb Phone	PalmPilot/ Blackberry Dial-Up	Smart Phone / Ubiquitous WIFI	Mobile-Enabled Apps / 5G
<b>RFI</b>	Mail	Fax Mail + Fax Combo	Email Mail	Email / Dropbox	Web-Enabled Apps
<b>ANALYTICAL TOOLS</b>	Adding Machine	MS Office		SaaS / Alteryx	A.I.
<b>RESEARCH</b>	Library	Library + Websites (limited)	Online databases/ Websites	SaaS Products	A.I.
<b>MAPPING</b>	Limited, Hand-drawn or print copy	ESRI	Google Earth	Tableau / Power BI / Web enabled GIS platforms	A.I.
<b>SITE VISITS</b>	In the field			Virtual Visits	AR/ VR
<b>REPORTING</b>	Typewriter	Web Processor	Print Hard Copies	Electronic	SaaS

# + Strata Platforms

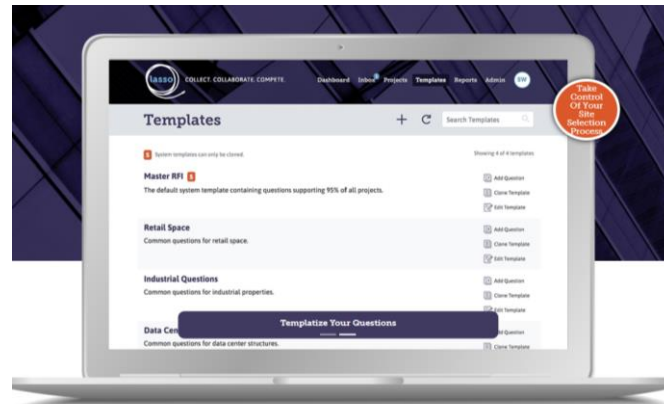
Facilitates the Site Selection Process from End to End

- Map Viewer



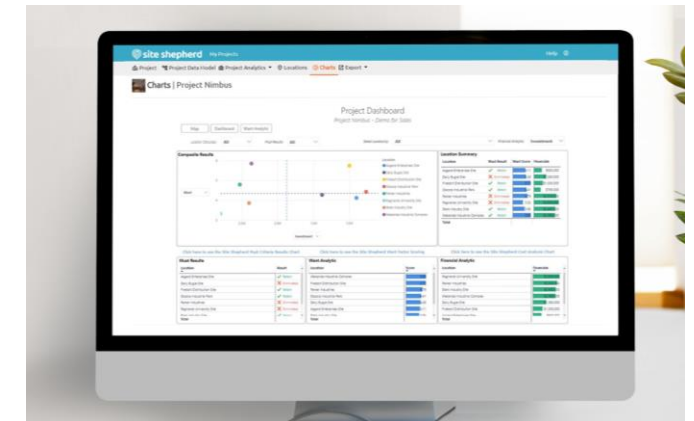
- A Zillow-like mapping solution for available commercial sites and buildings.

- RFI Manager



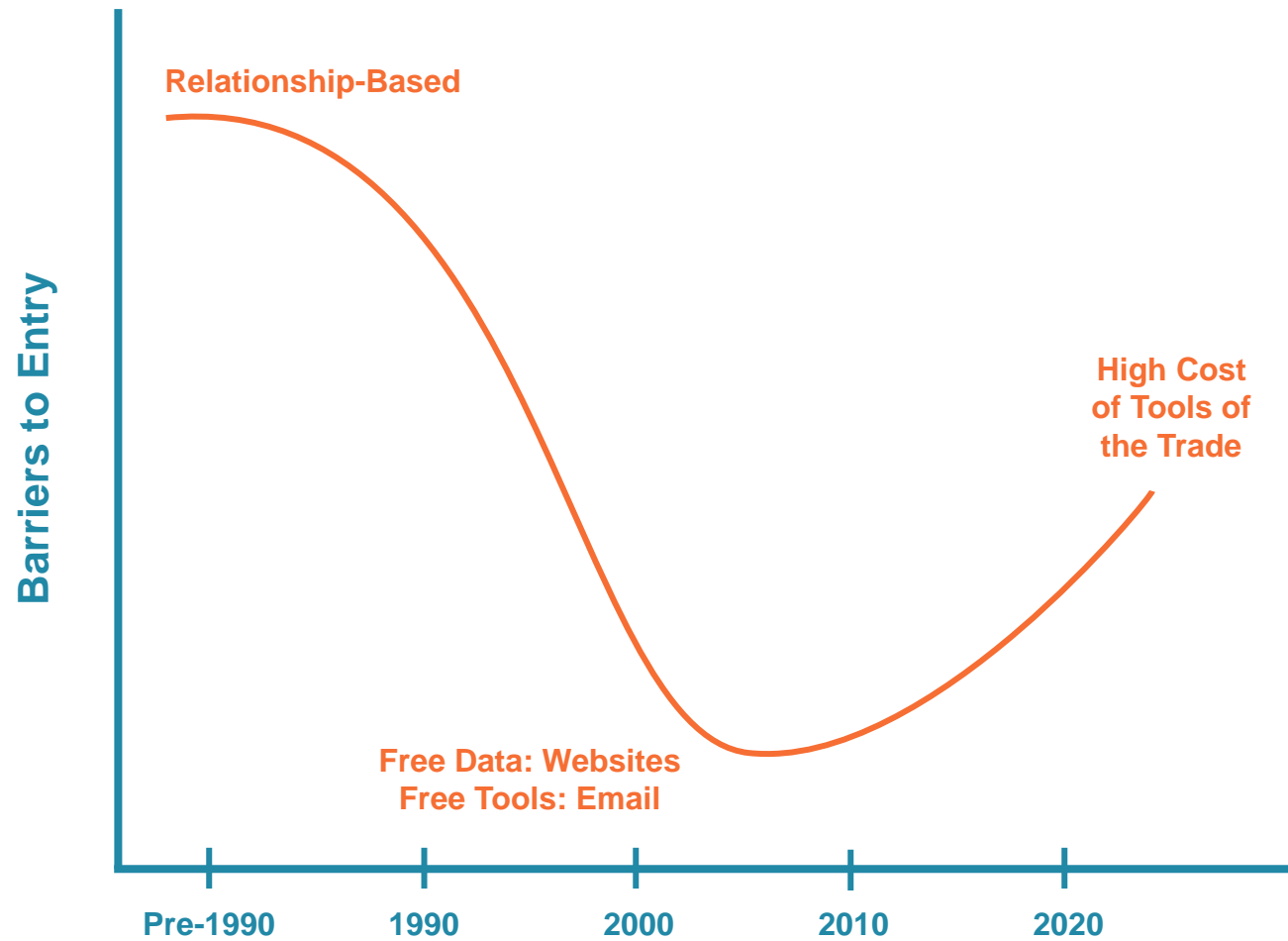
- The RFI manager allows for collaboration in collecting and storing data.

## Data Analytics & Reporting



- Financially assess and score properties on dozens of location criteria to make an informed decision.

# Site Selection Technology Through the Years





# Powered by Technology

Knowledge, Experience, A Full Technology Stack, and Data Resources – At Your Service

## PROPRIETARY TOOLS

- Site database built from past projects
- Site identification methodology to discover off-market sites
- Detailed example project profiles, categorized by industry sector
- Site evaluation and scoring models
- Site benchmarking software
- application
- Financial performance models
- Risk models
- Virtual site visit process
- Field site visit framework
- Workforce data analysis methods
- Employer interview process
- Project management methodology

## TECHNOLOGY TOOLS

- Geospatial platform, internal and client use
- Workforce data and visualization
- SmartCompliance incentives software with alliance partner, ADP
- Stakeholder surveys
- Natural gas data set
- Project Management applications
- Customer relationship management and sales tracking
- Location benchmarking software application
- Foreign direct investment data insight





CRASH COURSE ON THE SITE SELECTION PROCESS

# What can you do?



**Be site ready!**





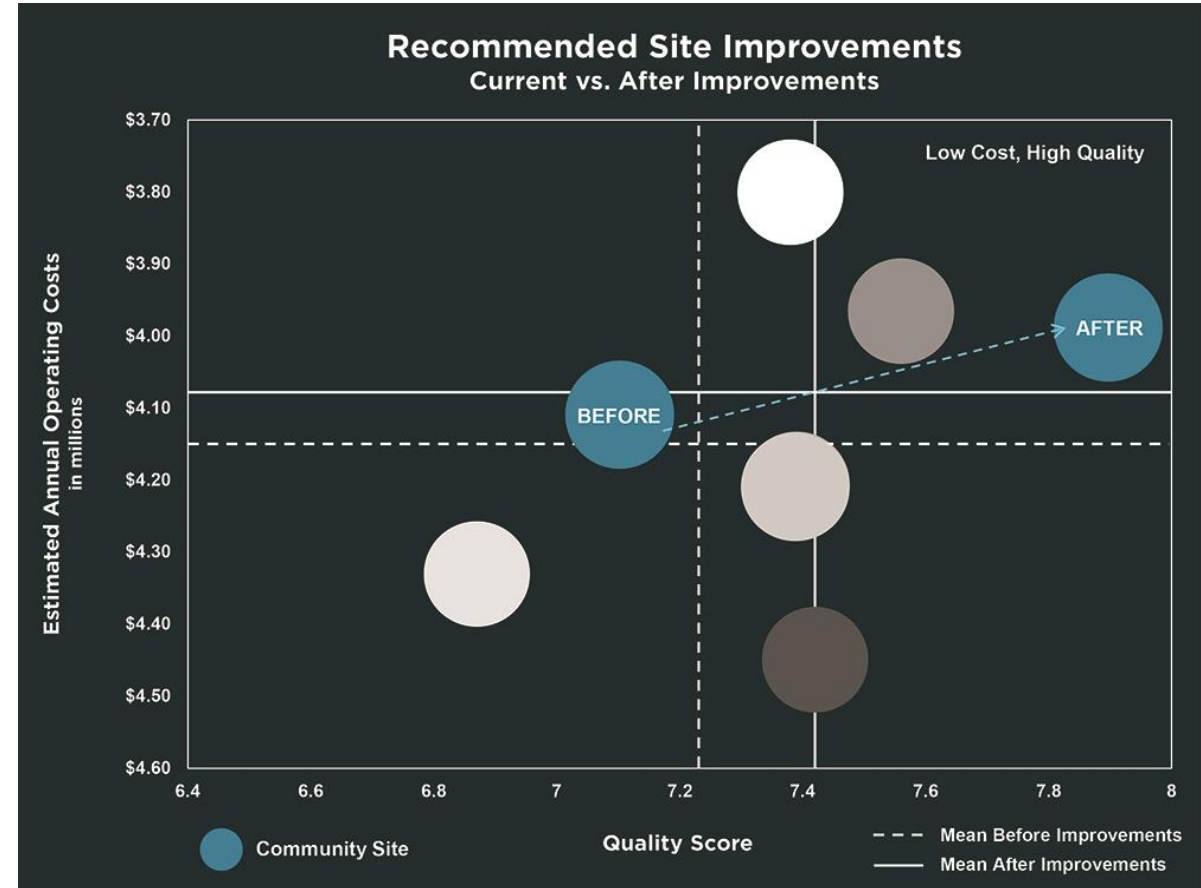
# #1 Identify your strengths and sites

## Benchmark Your Community

- Self-performer:
  - Lightcast
  - JobsEQ
  - GLS Insights report
- Hire consultant:
  - Reverse Site Selection

## Identify Your Sites

- Consider industry-specific requirements



# #2 Be Found

## Get in front of projects

- Piggyback on state/utility/rail map viewer
- Market your properties effectively using a map viewer
  - Add your own map viewer on your website
  - With LOIS your properties show up on the North American viewer

LOIS

## Johnson County, MO – Property Map Viewer

Showing 40 of 40 buildings by Sqft High

- West View Shopping Center Suite 721  
Warrensburg, MO  
22,500 SF
- Warrensburg, MO: West View Shopping Center (721)  
Warrensburg, MO  
22,500 SF
- Warrensburg, MO: Midtown Connection  
Warrensburg, MO  
14,961 SF
- Warrensburg, MO: West View Shopping Center (723B)  
Warrensburg, MO  
12,389 SF

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# #3 Be RFI Ready



**When you learn that your community is being considered for a project...**

**...and realize that you need to complete an RFI.**



# #3 Be RFI Ready

## Gather site information

## Prepare supporting documentation

- Studies (e.g., Phase I ESA, Engendered Species)
- Surveys (e.g., ALTA)
- Plans
- Maps (e.g., aerial, utility infrastructure, zoning)
- Shapefile (boundaries)



# #3 Be RFI Ready – “The Lasso Way”

## Reduce time spent on responding to RFIs

- **Invite collaborators** to help you answer RFI questions
- Deadline management to keep you on track
- Progress tracking at any stage
- **Data recall:** Recall previously submitted property data for new submissions

## Focus on project-specific questions that will help you win the project

## Spend the saved time on other, more important tasks

- Your day job
- Developing your product, your workforce, your pitch



# #3 Be RFI Ready – “The Lasso Way”

## Get invited to participate in a project

- Register for free Lasso account
- Anyone looking for a property can find you in the economic development directory

## Submit your sites to GLS

- Gets you into the GLS inventory with basic information

## Subscribe to Lasso

- Most appropriate for states, regions, utilities, and large counties managing multiple properties and projects
- Proactively engage communities in submissions, helping them to gather and manage information about properties to become site-ready
- Complete RFI template
- Internal web viewer
- Be the site selector
- Develop your product





The background of the image is a close-up, top-down view of parched, reddish-brown soil. The soil is cracked into a complex, irregular pattern of polygonal shapes, with deep, dark fissures separating the lighter-colored, brittle-looking clumps. The overall texture is rough and uneven, emphasizing the severity of the drought.

**We need sites.  
We don't just need dirt.**









**+** UNITED STATES  
**Best Places for Primary  
Metal Manufacturing**

2024 GLS INSIGHTS REPORT



**+** UNITED STATES  
**Best Places for  
Food Manufacturing**

2024 GLS INSIGHTS REPORT

[www.GLSinsights.com](http://www.GLSinsights.com)



Discount code: NACO

# Lasso Orientation

## How to Fill Out an RFI



### Details



Wed, May 08



11:00 AM - 12:00 PM EST



Online event



[Register](#)





# Crash Course on the Site Selection Process



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