



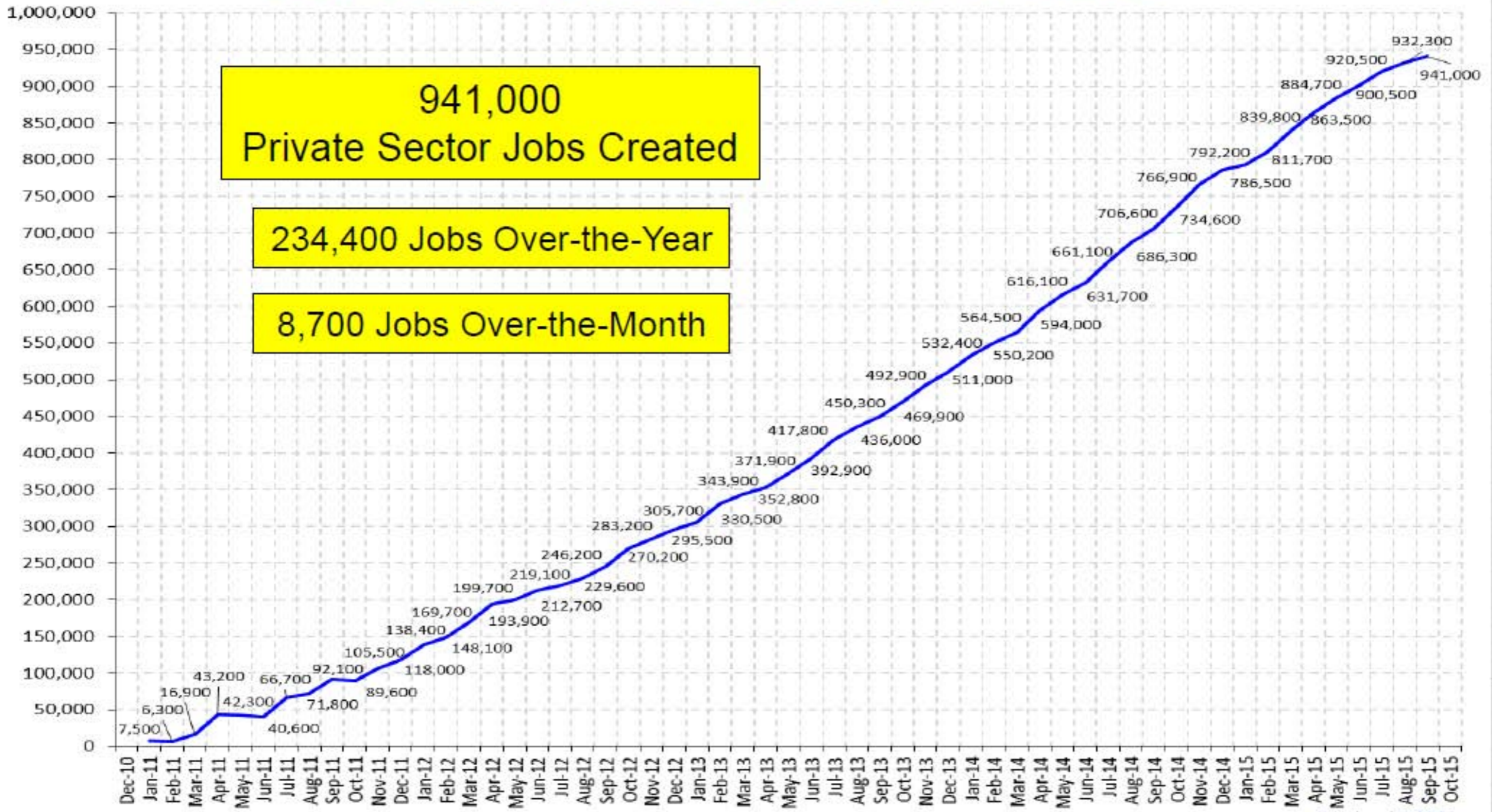
MOVING FLORIDA FORWARD

Alan Becker

Founding Shareholder, Becker & Poliakoff, P.A.
Vice-Chair, Enterprise Florida Board of Directors

Private-Sector Jobs Created

December 2010 – September 2015, Seasonally Adjusted



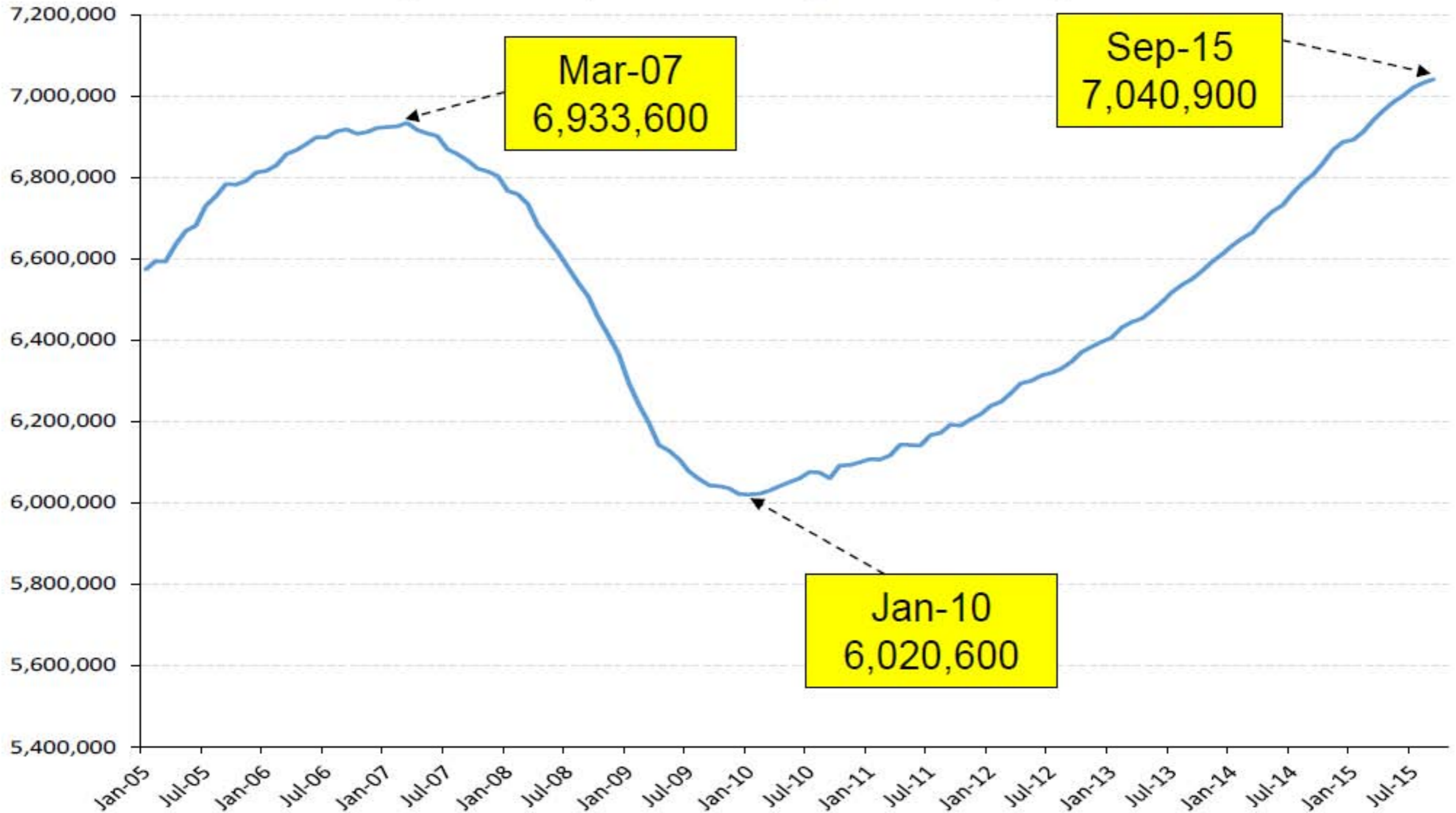
October 16, 2015



FLORIDA DEPARTMENT of ECONOMIC OPPORTUNITY

Private-Sector Employment

January 2005 – September 2015, Seasonally Adjusted



October 16, 2015



FLORIDA DEPARTMENT of ECONOMIC OPPORTUNITY

Private-Sector Job Growth

Florida vs. the Nation

Jurisdiction	Total Jobs Added OTY	% Increase
United States	2,603,000	2.2%
Florida	234,400	3.4%
North Carolina	111,000	3.2%
California	405,600	3.0%
Michigan	84,600	2.4%
Georgia	78,600	2.2%
Texas	205,900	2.1%
New York	126,100	1.6%
Ohio	49,500	1.1%
Pennsylvania	43,900	0.9%
Illinois	25,900	0.5%

- Since December 2010, Florida has had a 15.4% increase in private sector jobs while the nation as a whole has had a 10.9% increase.
- Florida had the fastest job growth rate of the ten most populous states.
- Florida added more private-sector jobs than Texas and New York over the year.

October 20, 2015

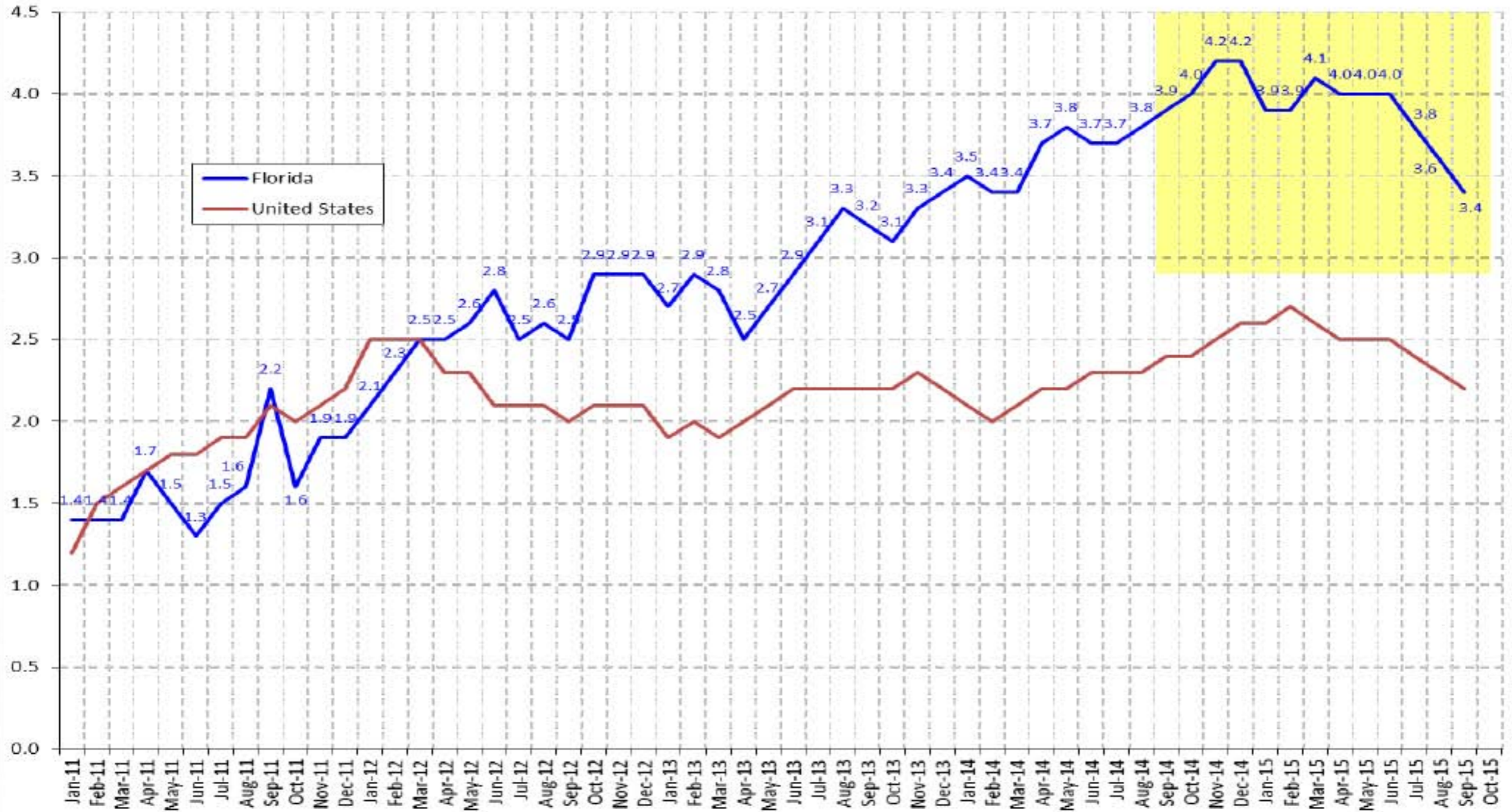


FLORIDA DEPARTMENT of ECONOMIC OPPORTUNITY



Over-the-Year Private-Sector Job Growth Rate

Florida and the United States



October 16, 2015

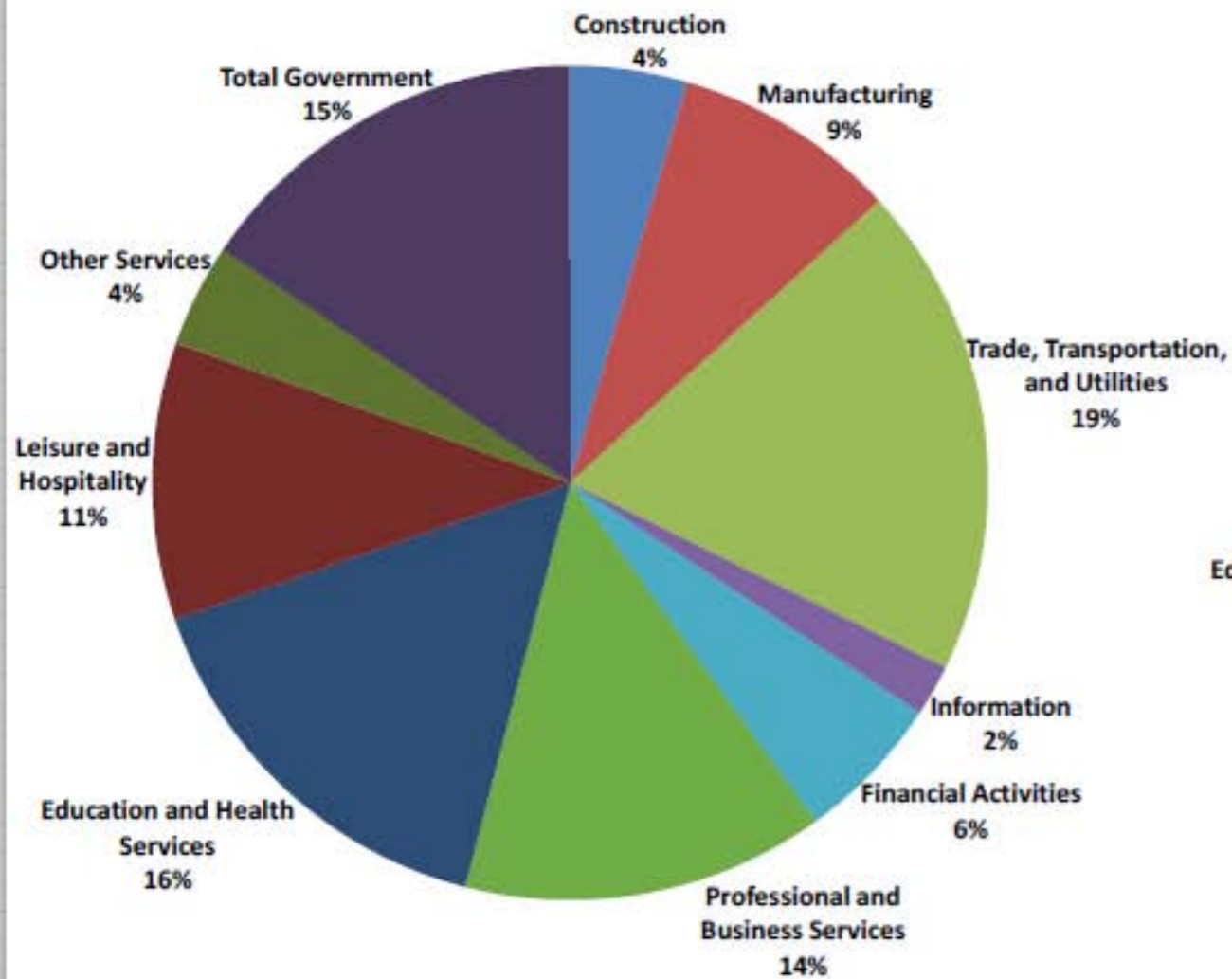


FLORIDA DEPARTMENT of ECONOMIC OPPORTUNITY

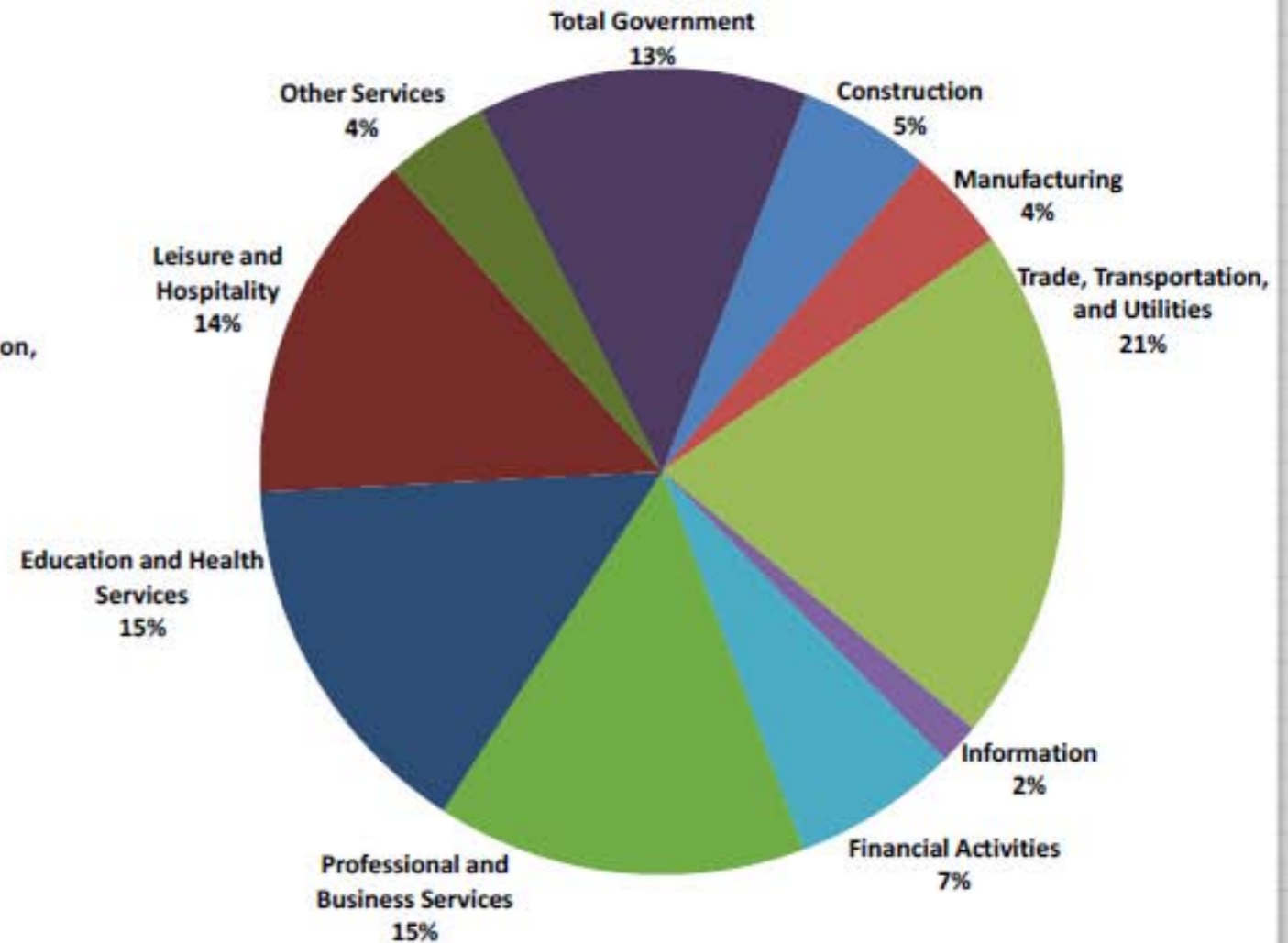
Nonagricultural Employment by Industry

September 2015 (Seasonally Adjusted)

United States



Florida



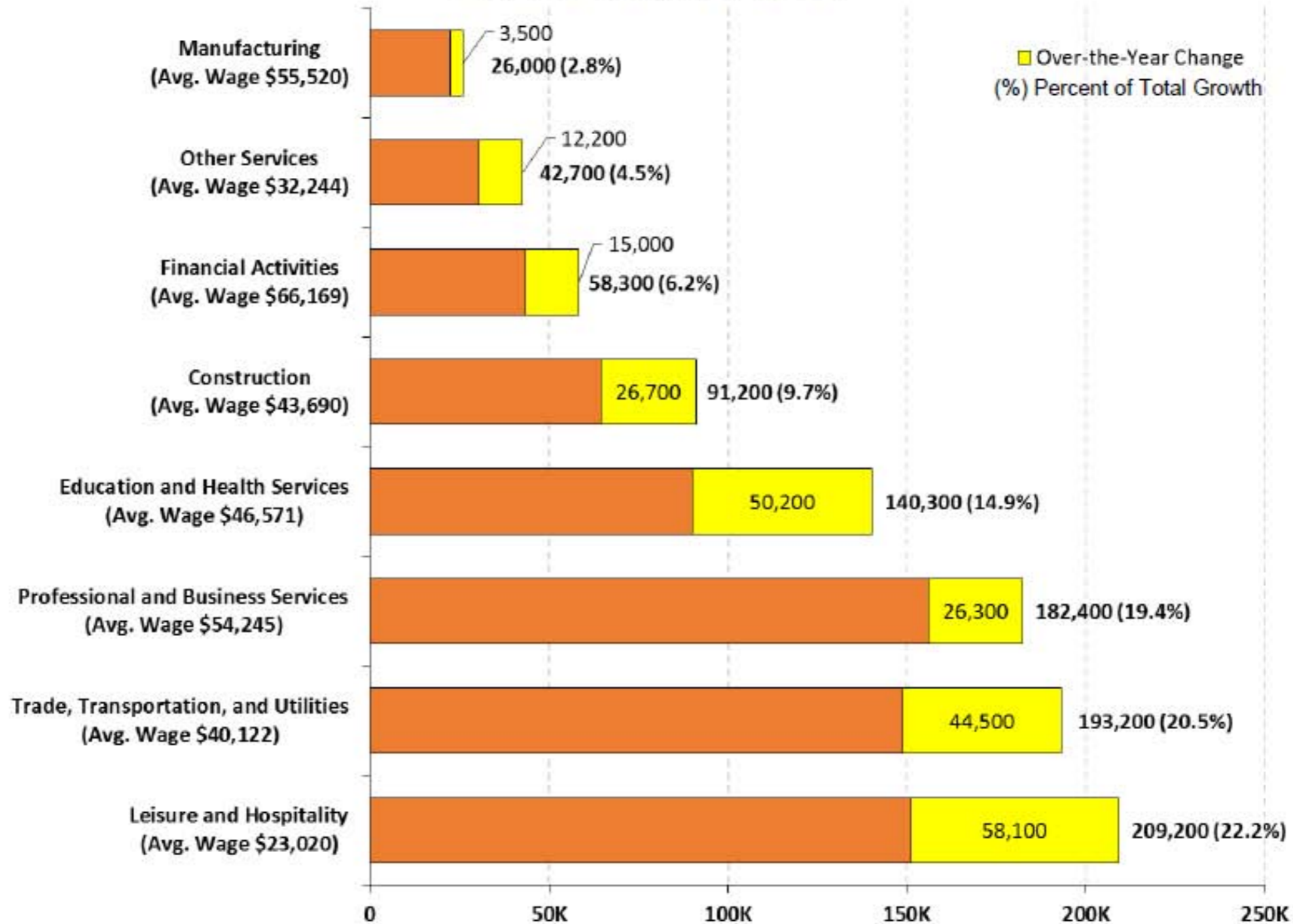
October 16, 2015



FLORIDA DEPARTMENT of ECONOMIC OPPORTUNITY

Private-Sector Job Growth by Industry

Since December 2010



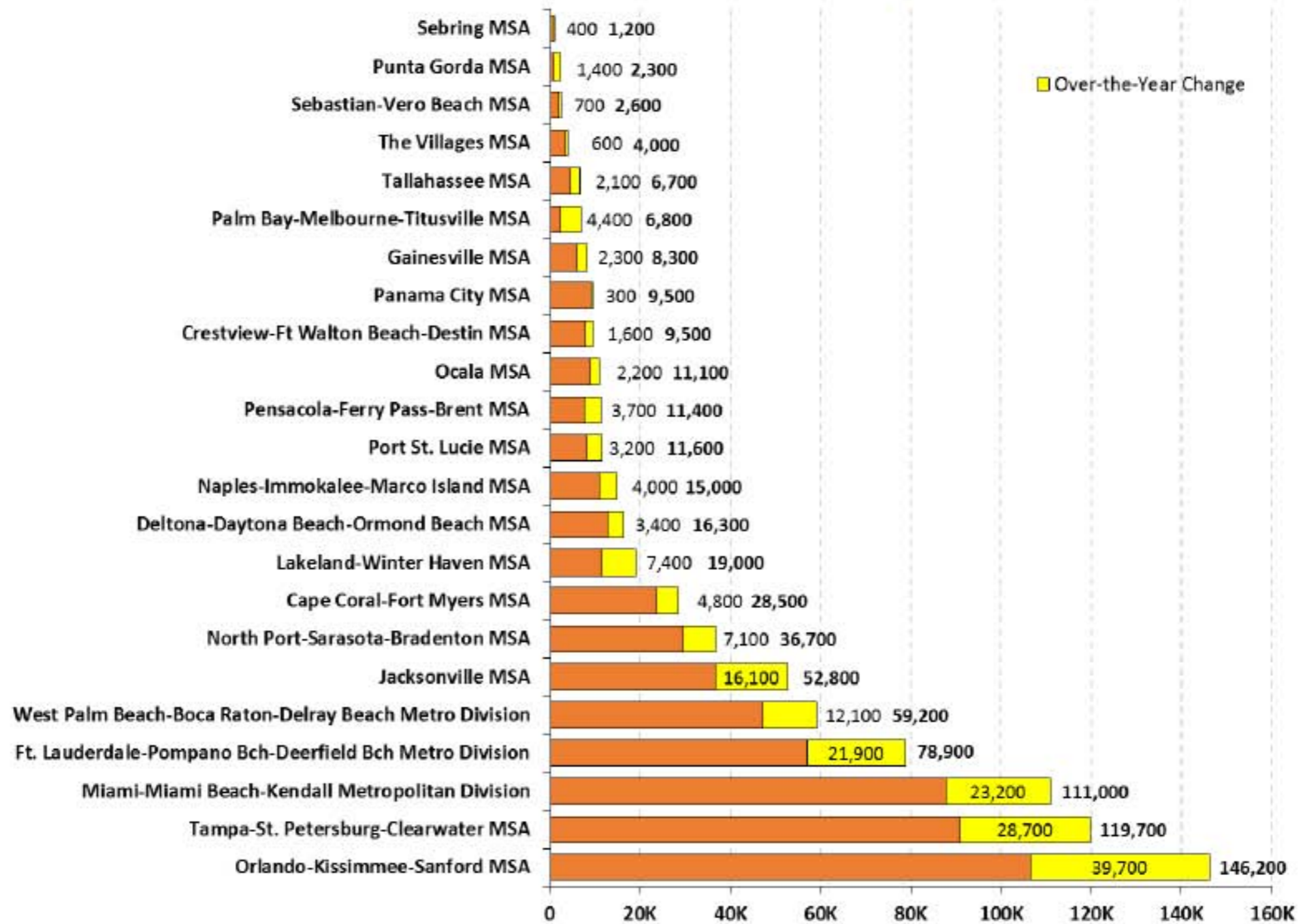
October 16, 2015



FLORIDA DEPARTMENT of ECONOMIC OPPORTUNITY

Florida Metro Areas Gaining Private-Sector Jobs

Since December 2010 - Not Seasonally Adjusted



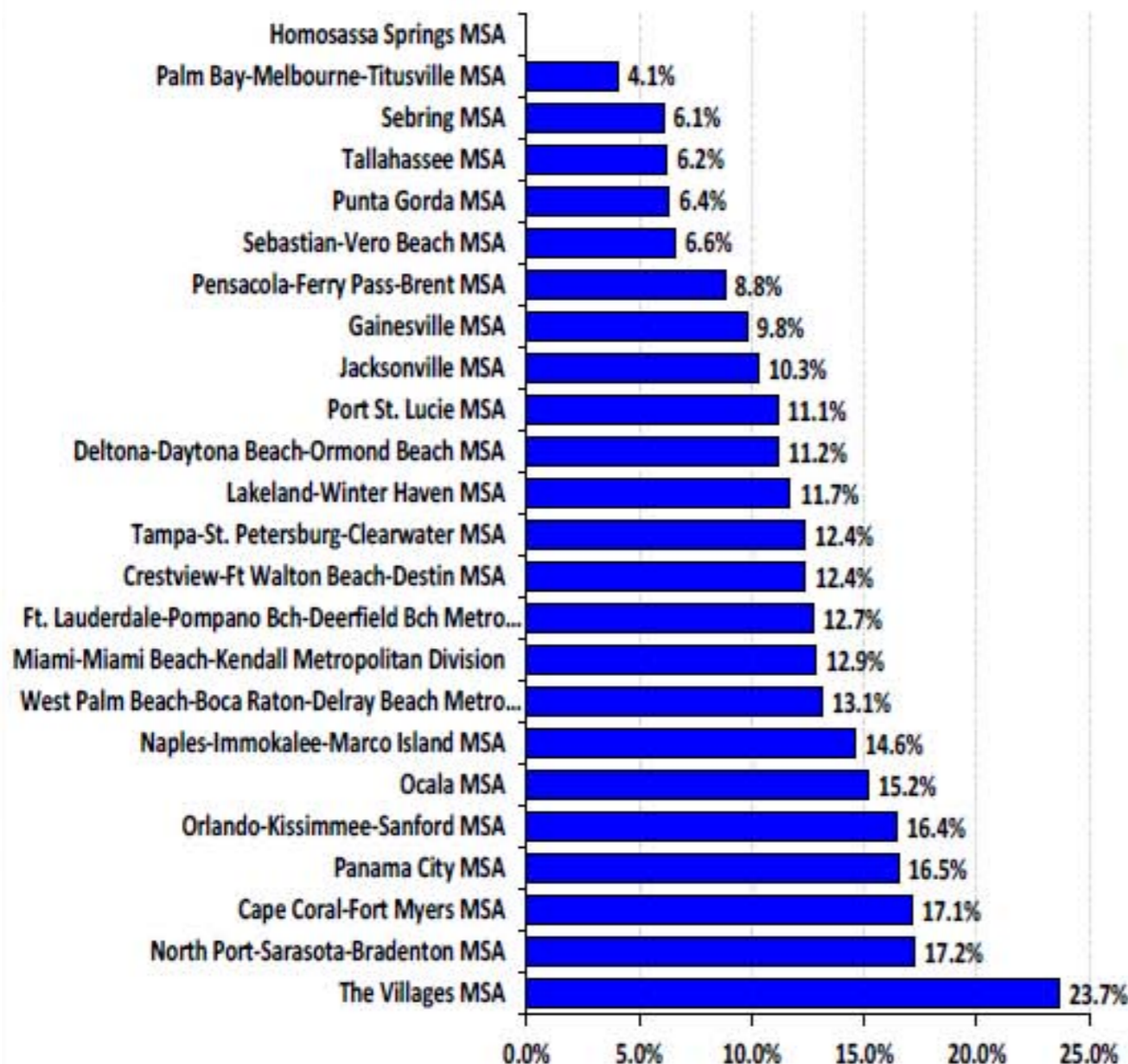
October 16, 2015



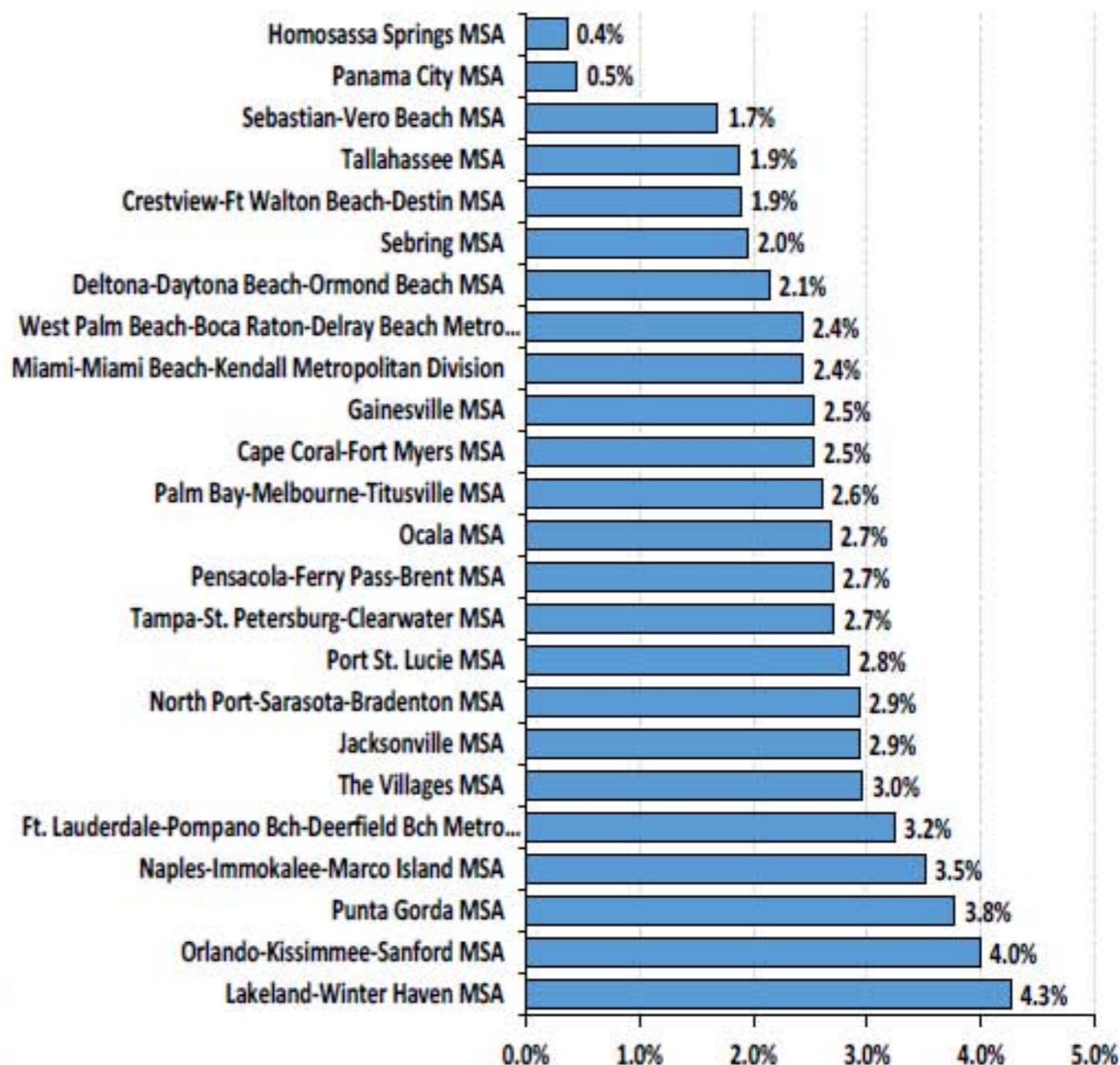
Florida Metro Areas Gaining Private Sector Jobs (Rate)

Since December 2010 - Not Seasonally Adjusted

Change Since December 2010



Over-the-Year Change



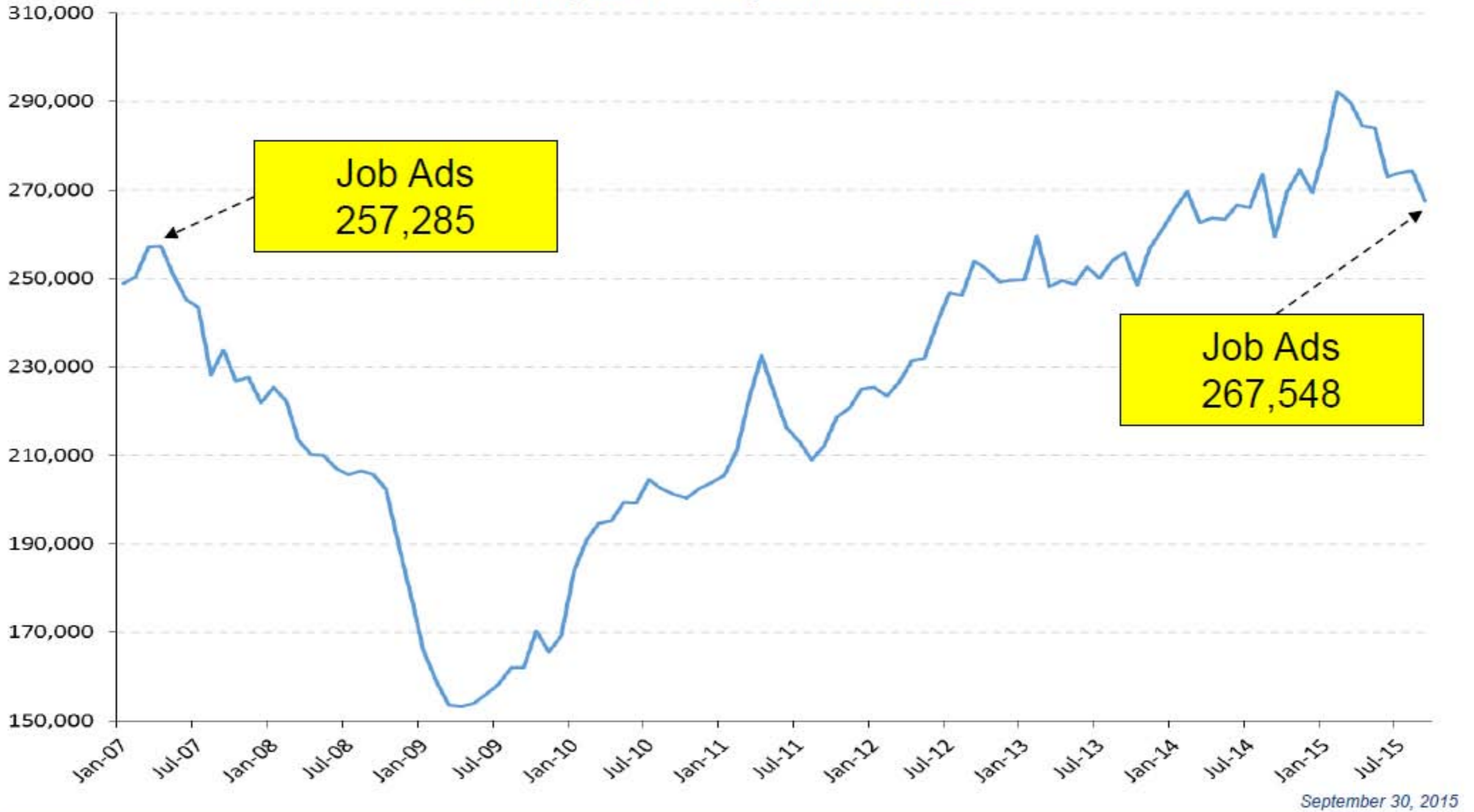
October 16, 2015



FLORIDA DEPARTMENT of ECONOMIC OPPORTUNITY

Job Demand


January 2007 – September 2015



FLORIDA DEPARTMENT of ECONOMIC OPPORTUNITY

Job Demand- All Occupations

Top 20 Advertised Occupations for Florida Not Seasonally Adjusted	Online Ads September 2015
Registered Nurses	15,970
Heavy and Tractor-Trailer Truck Drivers	7,742
Retail Salespersons	7,316
First-Line Supervisors of Retail Sales Workers	6,442
Customer Service Representatives	5,980
First-Line Supervisors of Office and Administrative Support Workers	4,743
Maintenance and Repair Workers, General	3,994
First-Line Supervisors of Food Preparation and Serving Workers	3,953
Computer User Support Specialists	3,647
Accountants	3,620
Computer Systems Analysts	3,442
Medical and Health Services Managers	3,327
Marketing Managers	3,249
Web Developers	3,209
Network and Computer Systems Administrators	3,145
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	3,066
Software Developers, Applications	3,052
Bookkeeping, Accounting, and Auditing Clerks	2,836
Executive Secretaries and Executive Administrative Assistants	2,727
Sales Representatives, Services, All Other	2,508

 = STEM occupations

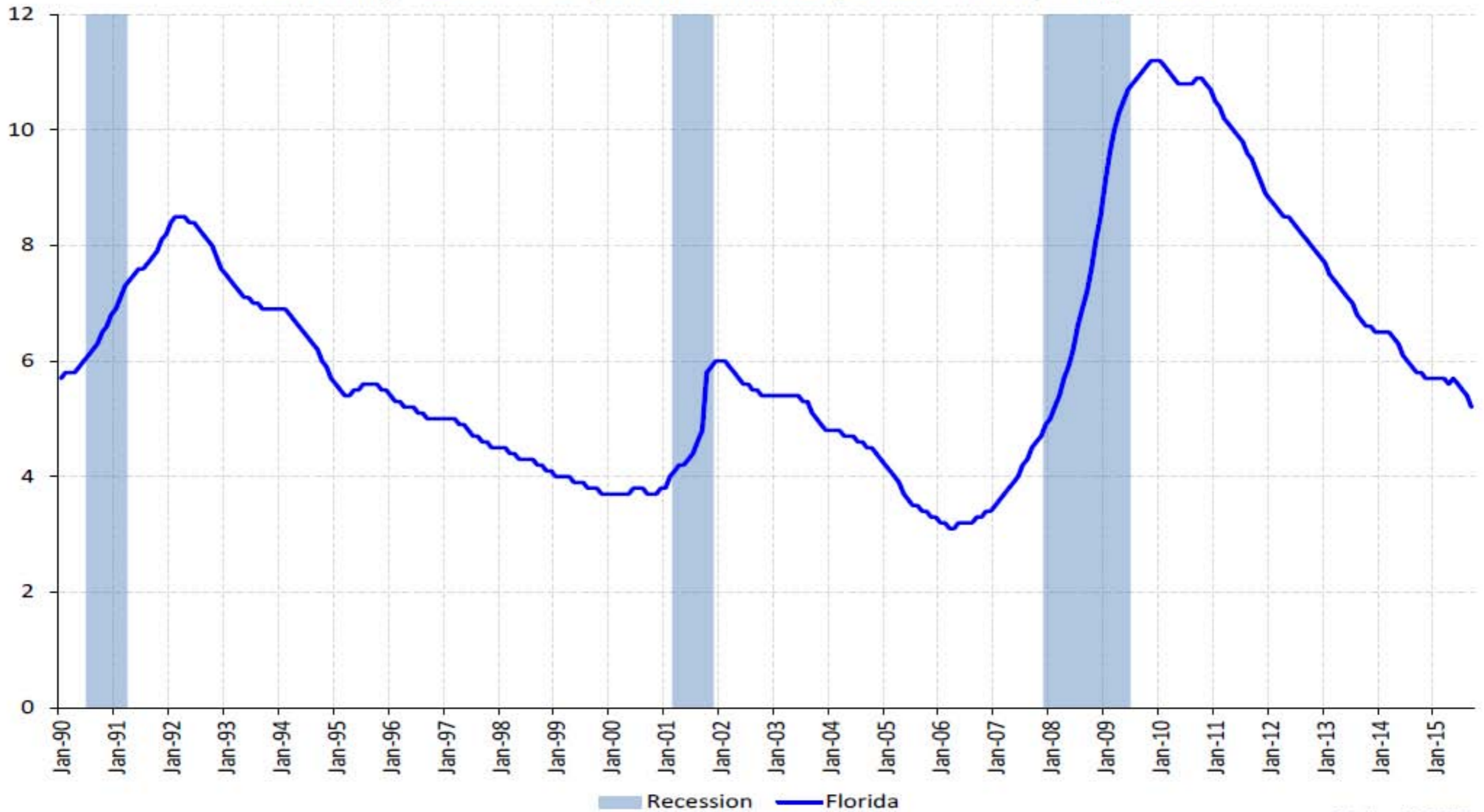
September 30, 2015



FLORIDA DEPARTMENT of ECONOMIC OPPORTUNITY

Florida Unemployment Rate

January 1990 – September 2015, Seasonally Adjusted



October 16, 2015



FLORIDA DEPARTMENT of ECONOMIC OPPORTUNITY

Total Employment In Florida

January 2005 – September 2015, Seasonally Adjusted



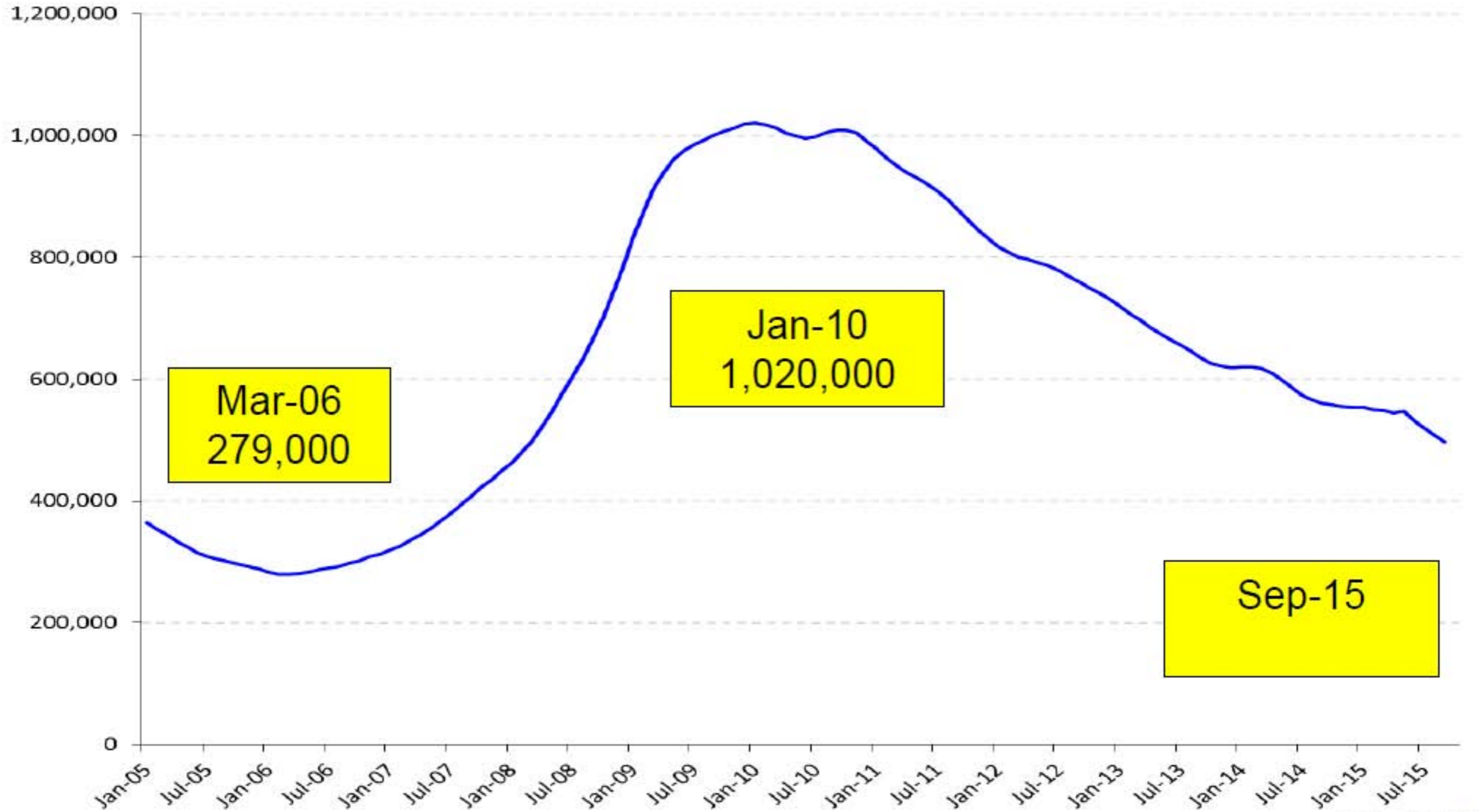
October 16, 2015



FLORIDA DEPARTMENT of ECONOMIC OPPORTUNITY

Total Unemployment In Florida

January 2005 – September 2015, Seasonally Adjusted



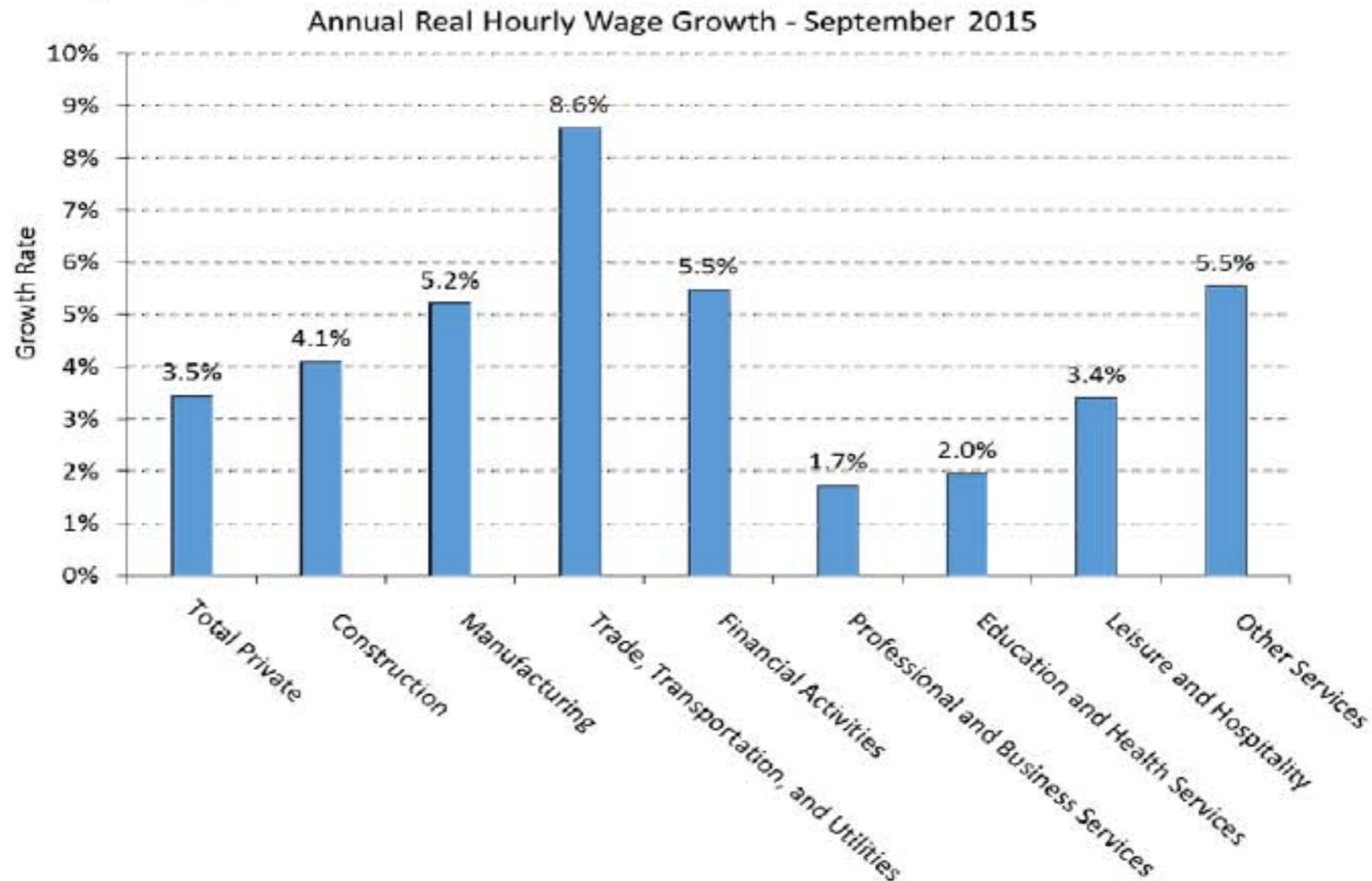
October 16, 2015



FLORIDA DEPARTMENT of ECONOMIC OPPORTUNITY

Wages

- 73.3% (691,400) of private sector jobs created are in industries with an average annual wage > \$40,000.
- 43.1% (407,000) of private sector jobs created are in industries with an average annual wage > \$45,000.
- Over the last year, real wages (inflation-adjusted) in the private sector are up 3.5%.



October 16, 2015



Enterprise Florida



Created by the Florida Legislature in 1996, Enterprise Florida, Inc. (EFI) is a public-private partnership between Florida's business and government leaders, and is the principal economic development organization for Florida.

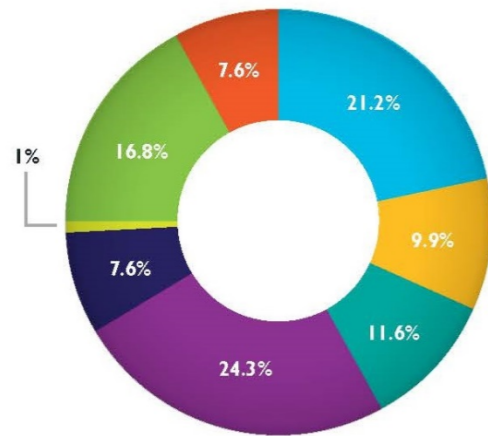
EFI facilitates job growth for Florida businesses through recruitment and retention, international trade and exporting, promotion of sports as an economic driver, capital funding programs to assist small and minority businesses, and protection of military bases across the state.

Enterprise Florida Funding



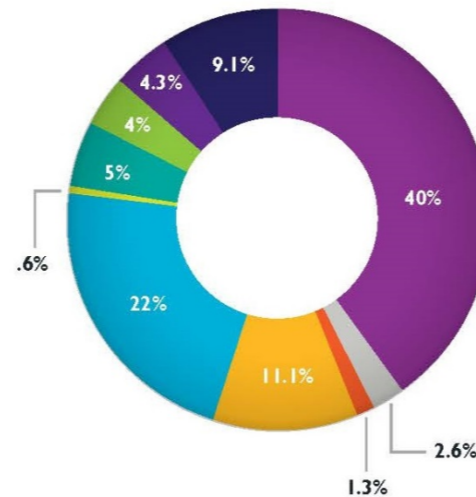
Use of Funds FY 2014-15
(Total Funds \$28,904,349)

- Strategic Partnerships
- Administration
- Marketing and Communications
- International Trade
- Business Development
- Minority and Business Development
- Sports Development
- Executive



Source of Funds FY 2014-15
(Total Funds \$38,515,310)

- General Revenue
- Florida International Trade and Promotion
- Minority Business Development
- Professional Sports Development
- State Small Business Credit Initiative (SSBCI)
- Federal Grant Assistance
- Corporate Contributions
- Program Revenues
- Grants to Sub Recipients (Pass through funding)
- Florida Defense Support



Corporate Contributions Growth



Florida's Target Sectors



Aviation & Aerospace



Life Sciences



Manufacturing



Defense & Homeland Security



Information Technology



Financial & Professional Services



Logistics & Distribution



Cleantech



Headquarters

What is a Target Industry?



- Statutory criteria:
 - Future growth
 - Stability
 - High wage
 - Market and resource independent (exception for clean energy projects)
 - Industrial base diversification and strengthening
 - Economic benefits with added emphasis on global trade and logistics
- Cannot be companies with NAICS codes 5611 or 5641 except under certain circumstances
- List updated every three years

Qualified Target Industry (QTI) Tax Refund



- Tax refund based on net new to Florida jobs
- Average wage at least 115% of state or local wage
 - State - \$49,340
- Requires 20% match from local community
- Must be a clear inducement
- Special considerations for Brownfield areas and Manufacturing companies paying 100% or greater of the average county wage
- Performance based

Business Development 2012-15



Competitive Projects Average Wage



Jobs Created



Capital Investment

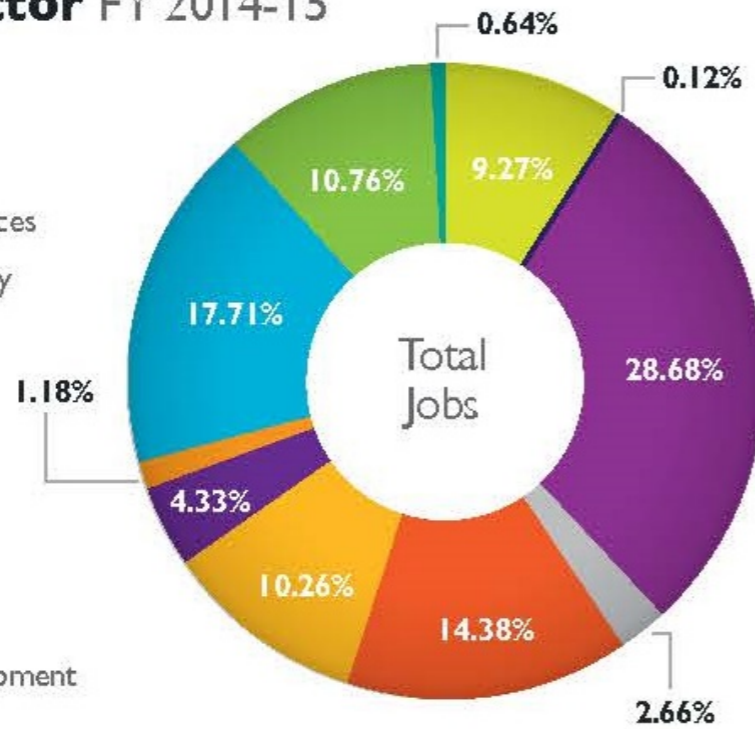


Performance by Target Sector



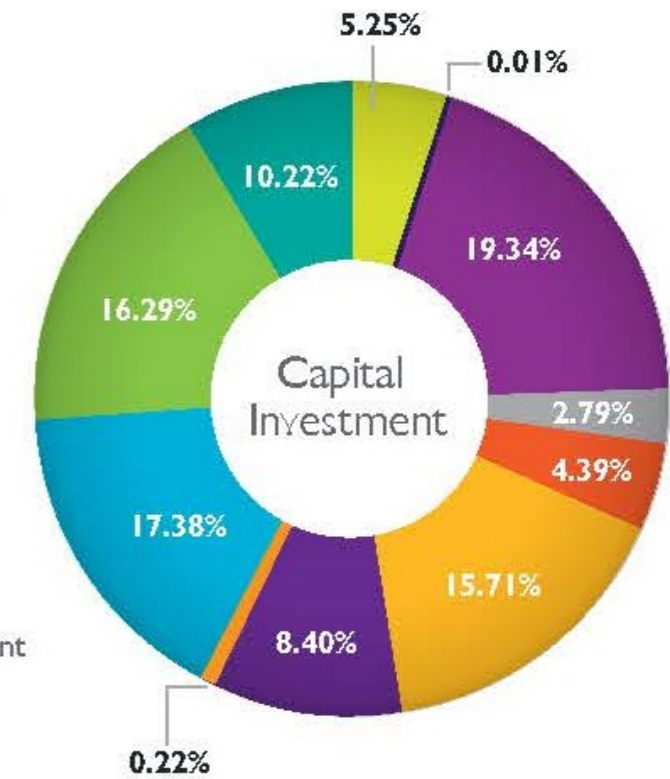
Total Jobs by Sector FY 2014-15

- Aviation/Aerospace
- Clean Technologies
- Financial/Professional Services
- Defense/Homeland Security
- Information Technology
- Life Sciences
- Logistics/Distribution
- Not in Target Sector
- Corporate/Regional HQ
- Manufacturing
- Other: Research & Development



Capital Investment by Sector FY 2014-15

- Aviation/Aerospace
- Clean Technologies
- Financial/Professional Services
- Defense/Homeland Security
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- Other: Research & Development



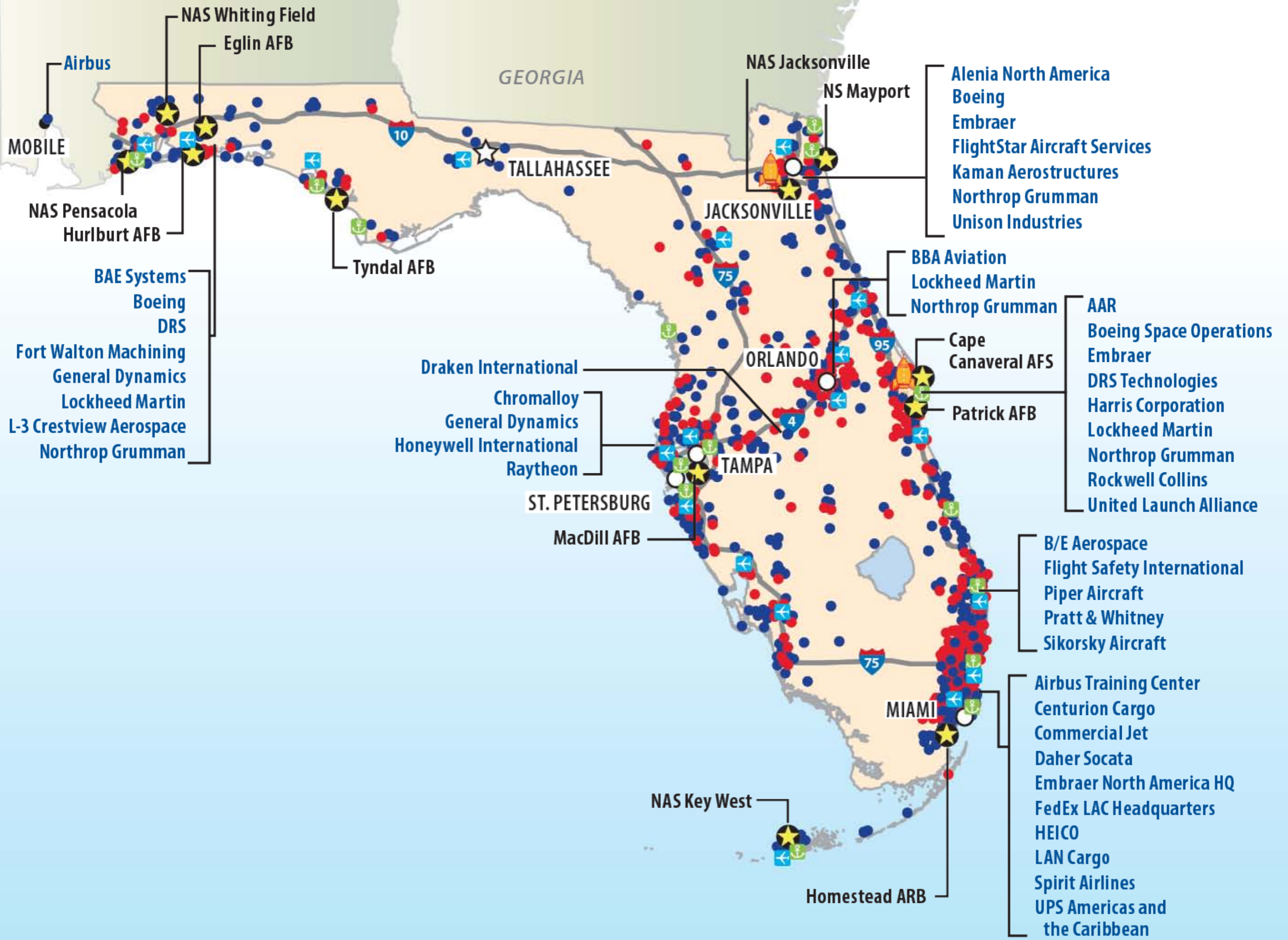


Aviation & Aerospace

#2 for Aviation &
Aerospace Businesses

Florida's Strengths

- Aircraft components
- Aircraft assembly
- MRO
- Cargo operations



Major Recent Project Wins

NORTHROP GRUMMAN

1,000+ jobs



EMBRAER

800 jobs



Pratt & Whitney

A United Technologies Company

230 jobs



SAFT

279 jobs

KAMAN

Aerospace

200 jobs



Life Sciences Leader

#2 Medical device manufacturing establishments in the U.S. with 580 companies in the state

#3 Pharmaceutical manufacturing establishments in the U.S. with 200+ companies in the state

#8 Biotech R&D establishments in the U.S. with 250+ companies in the state



Animal Genetics
Avian Biotech
Southern Biologics

Florida State University

Florida Agricultural & Mechanical University

Baptist Medical Center
Biomet Microfixation
Johnson & Johnson / Vistakon
KLS Martin Latin America & U.S.
McKesson Medical-Surgical
Medtronic
NovaBone

TALLAHASSEE

JACKSONVILLE

Mayo Clinic Jacksonville

Florida Hospital

Orlando Regional Healthcare System

Florida Institute for Human & Machine Cognition

GPD Pathology

Pall Corporation

AxoGen
Exactech
Invivo Diagnostics
Nanotherapeutics
RTI Biologics

University of Florida

UF Health Shands Hospital

ORLANDO

Acorn Stairlifts
Applied Genetics Laboratories
Covidien
DaVita
GeneLink Biosciences
Mazor Robotics
Nephron Pharmaceuticals
Prime Therapeutics
Sanofi Pasteur VaxDesign Campus

Bausch & Lomb Pharmaceuticals
Draper Laboratory
Mylan Pharma
Oscor

University of South Florida

H. Lee Moffitt Cancer Center and Research Institute

Tampa General Hospital

TAMPA

ST. PETERSBURG

University of Central Florida

Sanford-Burnham Medical Research Institute

Mann Research Center

Torrey Pines Institute for Molecular Studies

VGTI Florida

Scripps Florida

Max Planck Florida Institute

Baxter
Bristol Myers-Squibb
CAE Healthcare
Cambryn Biologics
Catalent
Conmed Linvatec
Covidien
Hoveround
Lincare
McKesson
Smith & Nephew
Steripack

Sarasota Memorial Hospital

NeoGenomics Laboratories

Arthrex

Biomet 3i
Biotest Pharmaceuticals
Cancer Treatment Centers of America
CSL Plasma
Dyadic
GE Healthcare
Johnson & Johnson/Depuy

Florida Atlantic University

Bascom Palmer Eye Institute

MIAMI

University of Miami

Florida International University

Actavis
Apotex
Baptist Hospital of Miami
Beckman Coulter
Bolton Medical
ERBA Diagnostics
Johnson & Johnson / Cordis
MAKO Surgical/Stryker
Medtronic Latin America
Merck
Nipro Diagnostics
Novartis Latin America
Noven Pharmaceuticals
OPKO Health
Teva
Welch-Allyn Latin America

Major Recent Project Wins

Bristol-Myers Squibb



579 jobs



Cancer
Treatment
Centers
of America®

225 jobs

 nanotherapeutics®

195 jobs


Actavis

220 jobs

 VISTAKON®

DIVISION OF
Johnson & Johnson Vision Care, Inc.

145 jobs



Top Ten Manufacturing State

#9 State for Manufacturing
Establishments

3rd Lowest Private Sector
Unionization Rate

18,000+ Companies

311,000 Workers



Manufacturing Leader

#2 State for Infrastructure ¹

#2 Best State for Business ²

3rd lowest unionization rate for private sector manufacturing among U.S. states ³

Top 3 state for workforce ⁴

#5 state for high-tech employment in the U.S. ⁵



Manufacturing Areas of Excellence

Florida's Strengths

- Electronic components
- Aerospace and defense products
- Metal fabrication
- Medical equipment





Defense & Homeland Security

#2 for Defense Systems Manufacturing
Businesses

Florida's Strengths

- Missiles and weapons
- Cybersecurity
- Disaster preparedness and response
- Training



Defense Areas of Excellence

Florida's Strengths

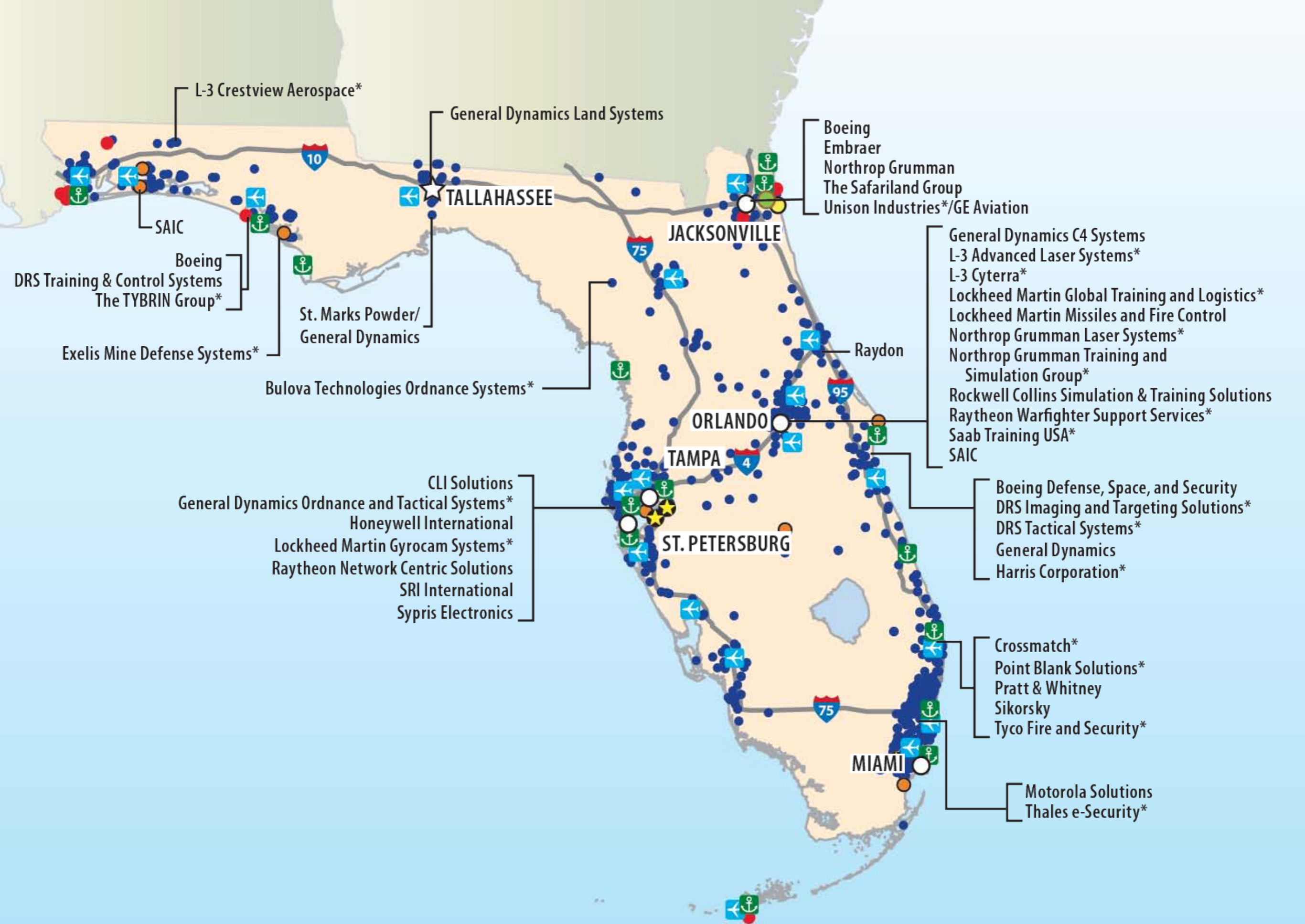
- Missiles and missile defense systems
- Electro-optics and lasers
- Simulation and training
- Defense & electronics
- Aircraft and aircraft components



Homeland Security Areas of Excellence

Florida's Strengths

- Cyber security and systems integration
- Disaster preparedness
- Response and recovery
- Airport, port and maritime security
- Biometrics



L-3 Crestview Aerospace*

General Dynamics Land Systems

Boeing
Embraer
Northrop Grumman
The Safariland Group
Unison Industries*/GE Aviation

TALLAHASSEE

JACKSONVILLE

SAIC
Boeing
DRS Training & Control Systems
The TYBRIN Group*
Exelis Mine Defense Systems*

St. Marks Powder/
General Dynamics

Bulova Technologies Ordnance Systems*

General Dynamics C4 Systems
L-3 Advanced Laser Systems*
L-3 Cyterra*
Lockheed Martin Global Training and Logistics*
Lockheed Martin Missiles and Fire Control
Northrop Grumman Laser Systems*
Northrop Grumman Training and Simulation Group*
Rockwell Collins Simulation & Training Solutions
Raytheon Warfighter Support Services*
Saab Training USA*
SAIC

Raydon

ORLANDO

TAMPA

CLI Solutions
General Dynamics Ordnance and Tactical Systems*
Honeywell International
Lockheed Martin Gyrocam Systems*
Raytheon Network Centric Solutions
SRI International
Sypris Electronics

Boeing Defense, Space, and Security
DRS Imaging and Targeting Solutions*
DRS Tactical Systems*
General Dynamics
Harris Corporation*

ST. PETERSBURG

Crossmatch*
Point Blank Solutions*
Pratt & Whitney
Sikorsky
Tyco Fire and Security*

MIAMI

Motorola Solutions
Thales e-Security*

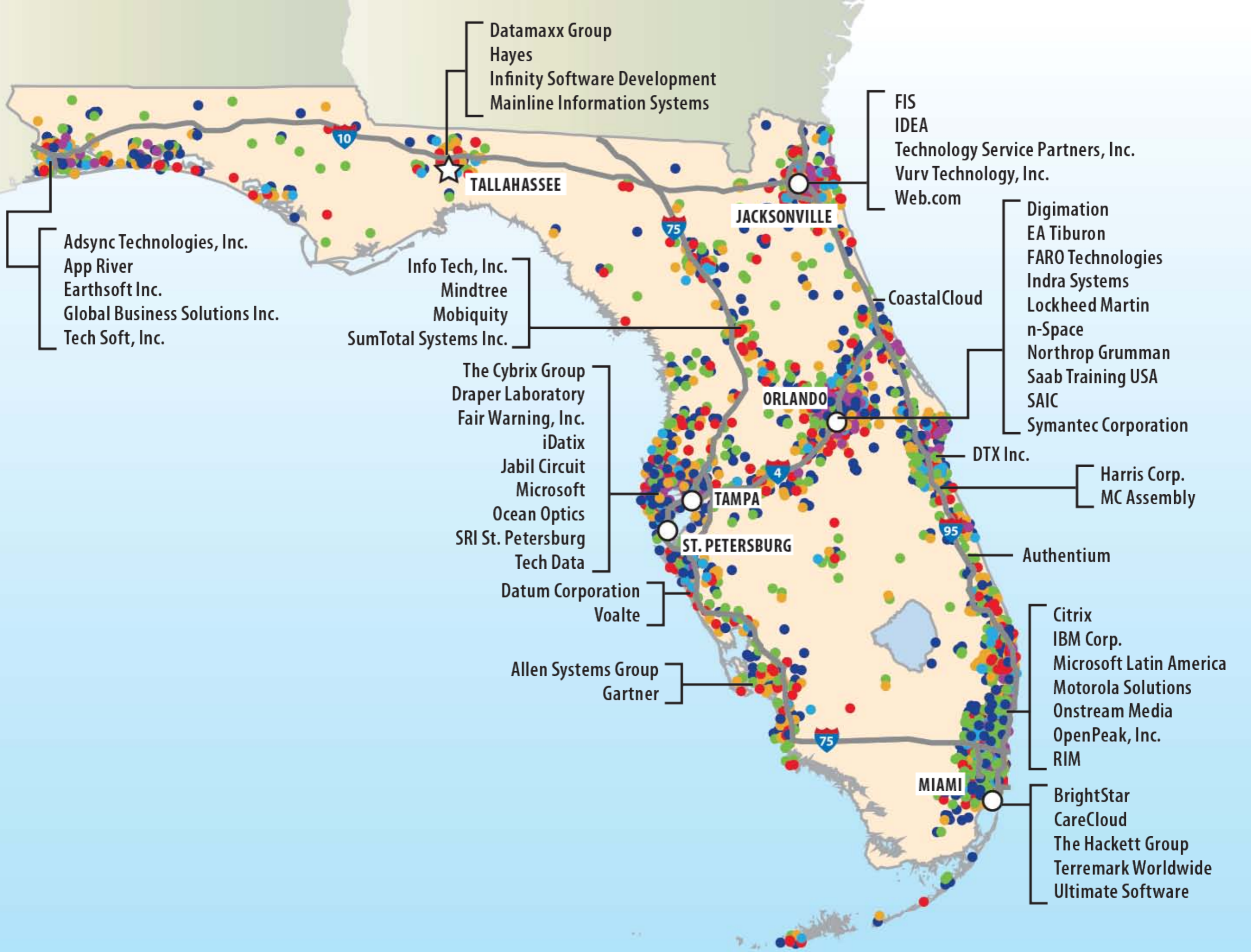


Information Technology

#3 for High-Tech Businesses

Florida's Strengths

- Phototonics and optics
- Modeling and simulation
- Microelectronics
- Communications
- Software



Datamaxx Group
Hayes
Infinity Software Development
Mainline Information Systems

FIS
IDEA
Technology Service Partners, Inc.
Vurv Technology, Inc.
Web.com

Adsync Technologies, Inc.
App River
Earthsoft Inc.
Global Business Solutions Inc.
Tech Soft, Inc.

Info Tech, Inc.
Mindtree
Mobiquity
SumTotal Systems Inc.

Digimation
EA Tiburon
FARO Technologies
Indra Systems
Lockheed Martin
n-Space
Northrop Grumman
Saab Training USA
SAIC
Symantec Corporation

The Cybrix Group
Draper Laboratory
Fair Warning, Inc.
iDatix
Jabil Circuit
Microsoft
Ocean Optics
SRI St. Petersburg
Tech Data

DTX Inc.
Harris Corp.
MC Assembly

Datum Corporation
Voalte

Allen Systems Group
Gartner

Authentium

Citrix
IBM Corp.
Microsoft Latin America
Motorola Solutions
Onstream Media
OpenPeak, Inc.
RIM

BrightStar
CareCloud
The Hackett Group
Terremark Worldwide
Ultimate Software

Major Recent Project Wins

245 jobs

180 jobs

Gartner[®]

400 jobs

200 jobs



Financial & Professional Services Leader

3rd Largest finance and insurance cluster in the U.S. ¹

2nd in the U.S. in number of professionals, scientific & technical services establishments ¹



Financial & Professional Services Leader

170 commercial banks with \$131 billion in assets operate in Florida¹

450+ insurance companies are located in Florida and nearly 2,200 regulated insurance companies do business in the state.²



Kaye Scholer
Mainline Information
Systems, Inc.

Aetna
Bank of America
Citi
Deutsche Bank
EverBank
Fidelity Investments
Fidelity National Financial
Florida Blue
JP Morgan Chase
Black Knight Financial Services
Modis, Inc.

Navy Federal
Credit Union

Citi
Depository Trust & Clearing Corp.
Hamilton Engineering & Surveying, Inc.
Holland & Knight LLP
JP Morgan Chase
Kforce Inc.
MetLife
Morgan Stanley Wealth Management
PNC
Price Waterhouse Coopers
Raymond James Financial, Inc.
Sykes Acquisition, LLC
T. Rowe Price
USAA
WellCare Health Plans, Inc.

Brown & Brown, Inc.

Acosta
BNY Mellon
CNL Holding LLC
Convergys
Digital Risk
Fairwinds Credit Union
Verizon Communications

FCCI Insurance Group
VWA Capgemini

DCR Workforce
FTI Consulting
Ocwen Loan Servicing, LLC
Templeton International, Inc.
Tyco Integrated Security LLC

G4S Secure Solutions (USA)
Gartner, Inc.

Akerman Senterfitt
BankUnited Financial Corp.
Greenberg Traurig, P.A.
H.I.G. Capital
MEDNAX, Inc.



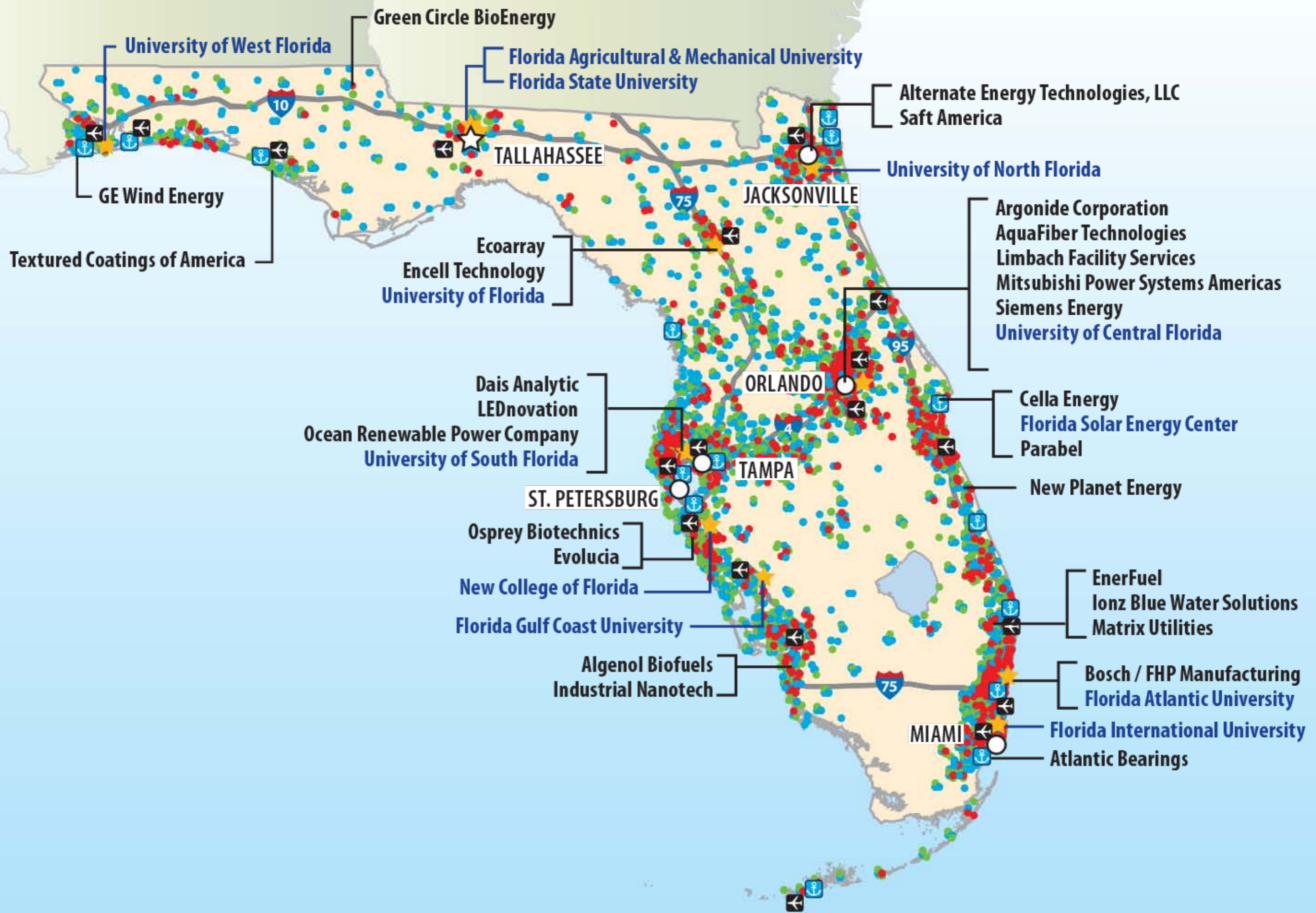
Cleantech Leader

3rd in cleantech employment ¹

#2 in annual biomass production

1,350 miles of coastline and proximity to the Gulf Stream are well suited for all types of ocean energy R&D and deployment

Home to one of the nation's largest solar photovoltaic plants



Green Circle BioEnergy

University of West Florida

Florida Agricultural & Mechanical University
Florida State University

Alternate Energy Technologies, LLC
Saft America

TALLAHASSEE

JACKSONVILLE

University of North Florida

GE Wind Energy

Textured Coatings of America

Ecoarray
Encell Technology
University of Florida

Argonide Corporation
AquaFiber Technologies
Limbach Facility Services
Mitsubishi Power Systems Americas
Siemens Energy
University of Central Florida

ORLANDO

Dais Analytic
LEDnovation
Ocean Renewable Power Company
University of South Florida

Cella Energy
Florida Solar Energy Center
Parabel

TAMPA

New Planet Energy

ST. PETERSBURG

Osprey Biotechnics
Evolucia

New College of Florida

Florida Gulf Coast University

EnerFuel
Ionz Blue Water Solutions
Matrix Utilities

Algenol Biofuels
Industrial Nanotech

Bosch / FHP Manufacturing
Florida Atlantic University

MIAMI

Florida International University
Atlantic Bearings



Corporate Headquarters Leader

#1 State for Innovation¹

#2 Infrastructure in the U.S.²

#2 Best State for Business³

#3 Workforce in the U.S.⁴

#5 Best Tax Climate for
business in the U.S.⁵

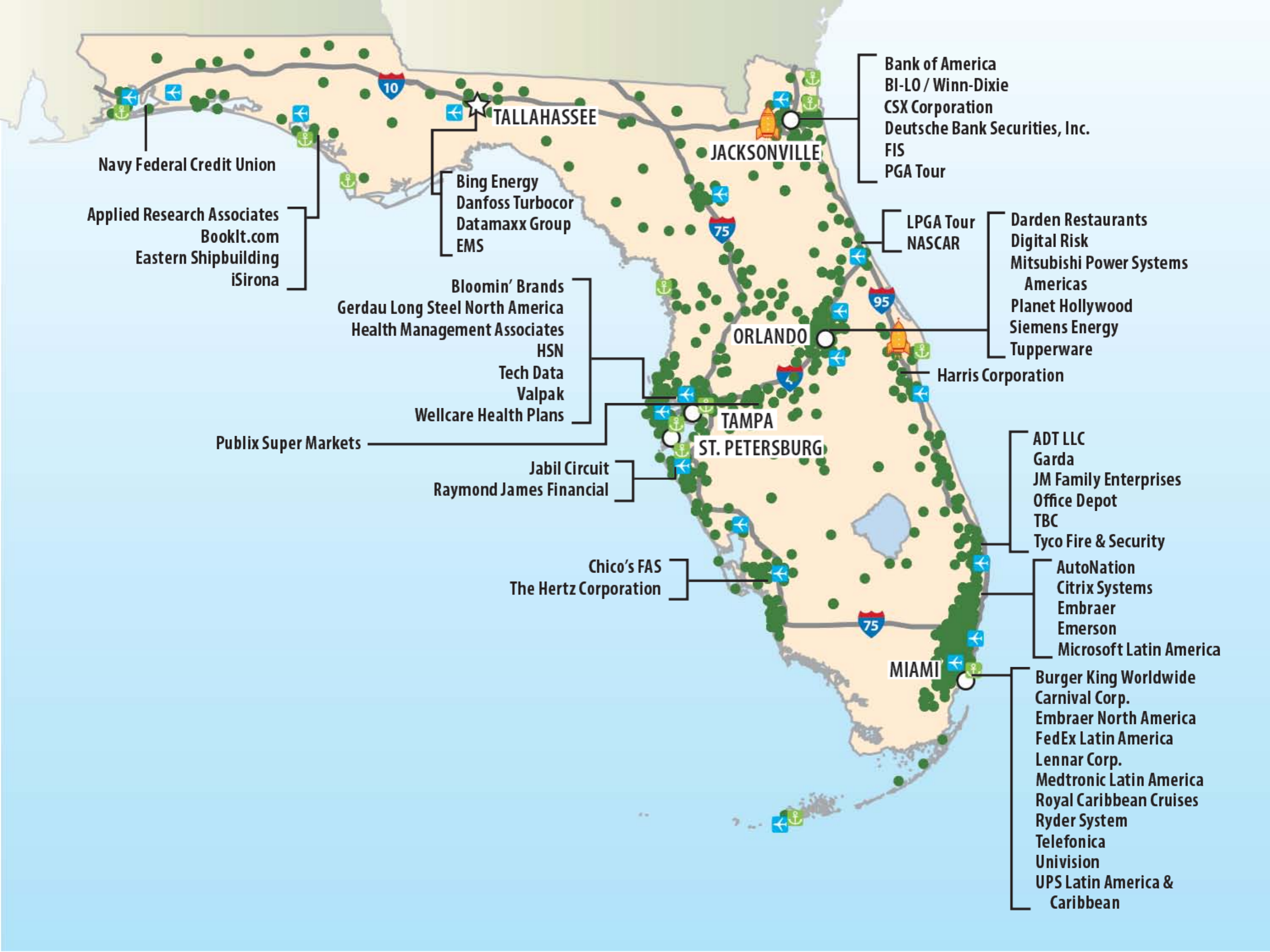


Corporate Headquarters Leader

0% personal income tax
guaranteed by constitutional
provision

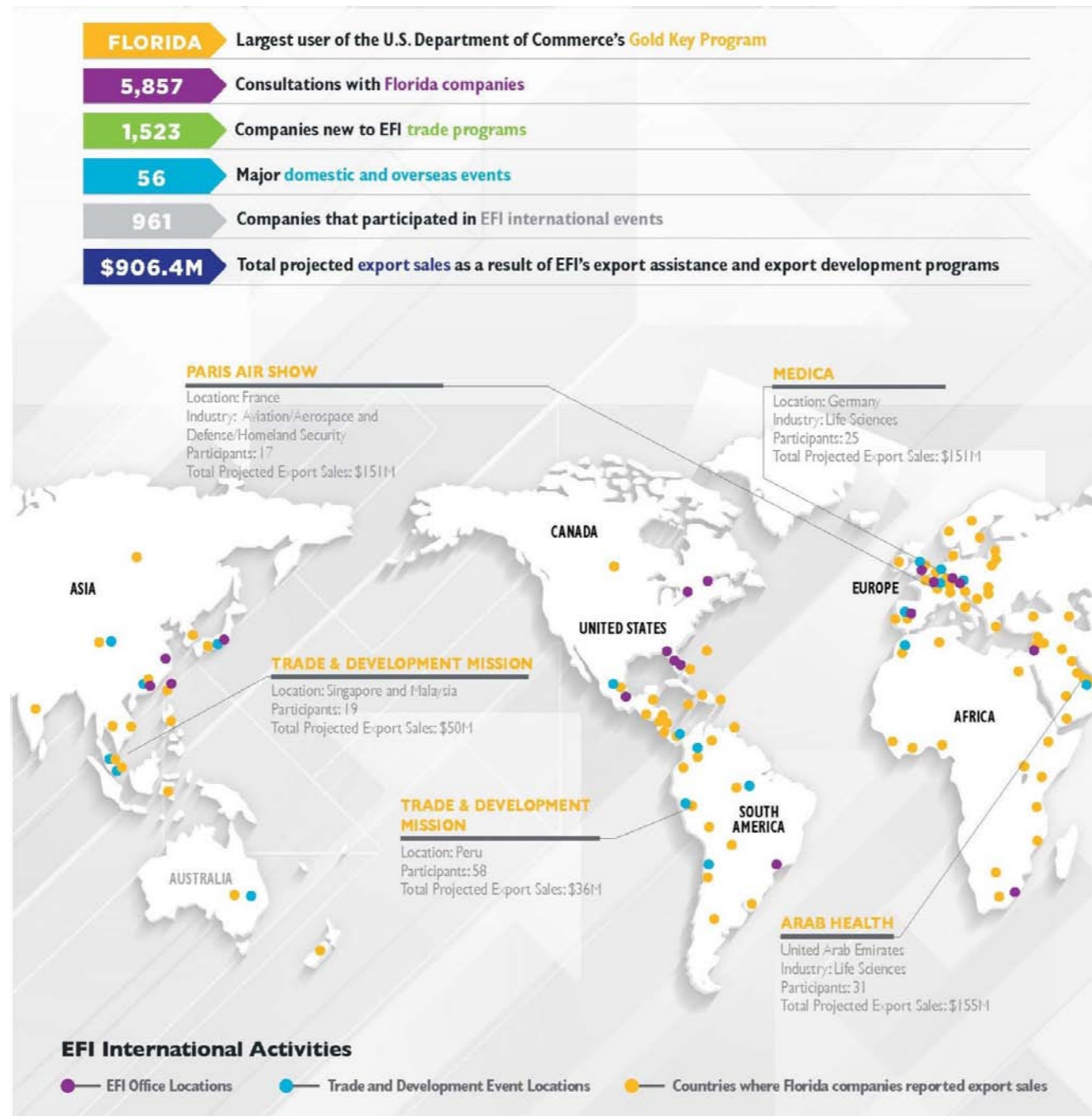
Home to **16 Fortune 500**
corporate headquarters

300 regional and hemispheric
headquarters of international
companies





Global Outreach



Strategic Partnerships



140

Active **Strategic Partners**

\$1.875M

Investor **Capital Raised**

4

New **Investors**

65

Total Number of **Board Members**

92%

Board Retention