

Project Impetus

Western New York Science & Technology Advanced Manufacturing Park

- NY success with IBM, Albany NanoTech and Luther Forest.
- NY needs added large sites to accommodate microelectronics industry.
- NY Officials asked CH2M HILL to locate ideal potential locations.
 - + Convergence of utilities a must.
 - + Over a million plus population for workforce pool.
 - + Higher education institutions for research and work force development.
- NY strategy reaffirmed by SEMICO study.
- 2006 – NY landed Advanced Micro Devices (AMD) microchip manufacturer to invest \$3.2B Phase 1, creation of 2,000 jobs on initial anchor project in the Luther Forest shovel ready park.



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Key Points

- New York State has made significant investments in high tech in recent years, with excellent returns on that investment. As shown next, the State has invested about \$500M and private companies have invested more than \$3.5B (and growing) into Albany NanoTech.
- The SEMICO Study was an independent 3rd party analysis done by an expert on economics. The output of this study concluded that New York State's investment would be fully returned within about 2.5 years on direct tax refunds. If the State's overall benefit due to state gross domestic product were included, the return on investment was less than a year.
- The impetus for this project was based on the requirement to have additional shovel-ready sites larger than 1,000 acres built in a green and campus-like setting to attract the most sophisticated and technical advanced manufacturing workforce. This would combine the synergy of the state investment, utilize the industrial cluster's technical talent with the region's assets and attributes to provide the next global competitive site.
- Western New York has an opportunity to leverage the NYS high tech investment on the 1000+ acres Science and Technology Advanced Manufacturing Park (STAMP), which is situated in an area of adequate technical universities and population centers. This would garner additional returns across the state.

Project Impetus

Western New York Science & Technology Advanced Manufacturing Park

Institute of Nanoelectronics, Discovery & Exploration
\$435M,
CleanRoom=35k sf

NanoFab South & Annex
\$294M;
CleanRoom=28k sf

NanoFab North
\$486M;
CleanRoom=41k sf

NanoFab 200
\$59M;
CleanRoom=6k sf

Albany NanoTech

- NYS is well-invested in high technology
- Over \$4B investment in Albany NanoTech (buildings & tools)

AMD Luther Forest



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Key Points

- Albany NanoTech is a visible, tangible example of the New York State investment in high tech. The state has invested over \$500M but private companies have invested the vast majority or approximately \$3.5 Billion. This demonstrates the strength of leverage.
- All the buildings demonstrated above have now been completed and are housing very sophisticated research and development (R&D) equipment. New companies are currently in the process of moving into the most recently completed building called Institute of Nanoelectronics, Discovery & Exploration (INDEX).
- Albany NanoTech formed the basis of the industrial cluster support and established critical equipment suppliers, spare parts, materials, specialized substrates, and the technical talent to enable the infrastructure.
- Success at Albany NanoTech enabled New York State to compete and win the most recent new semiconductor plant announcement, with Advanced Micro Devices (AMD) selecting the Luther Forest Technology Campus, which is 20 minutes north of Albany. This success translates across the region and the State to satisfy the need for advanced manufacturing acumen.

GCEDC Overall Project Timetable

Western New York Science & Technology Advanced Manufacturing Park

Phase 1 (Planning): STAMP Feasibility Study Complete – 3Q08

Phase 2 (Design): 2008-09 – Requires Funding / Support

- Land Use Actions: (Town, County) – Comp. Plan / Zoning et. al.
- Benchmarking Visits: To similar communities.
- Enhanced Cost Analysis: Site/Industry Costing, Fiscal/Economic/Real Estate & Property Tax Impacts
- Marketing / Selling Plan and Sales SWAT Team Model Development
- Comprehensive Engineering & Environmental Assessment
- Land Acquisition (phased funding model / commitments)
 - *Secure commitments for idle John B. White Game Farm for project purposes; 20-30 acres to be reserved for possible future uses.*
- Workforce Development Planning (K-16)
- Project Management

Phases 3&4 (Implementation & Management): Late 2009+

- Funding of Phases 3, 4
- Land Acquisition
- Infrastructure Construction
- Site Marketing & Selling
- Workforce Development Programming and Integration



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Key Points

- This Feasibility Study completes Phase 1 (Planning) of the overall STAMP timetable.
- Phase 2 (Design) requires funding initiative.
- Phase 2 includes detailed actions to position the STAMP site in the high tech marketplace and to enable strategic marketing and selling of the site to advanced manufacturing industry sectors.

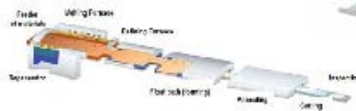
Public Dialog Sessions

Western New York Science & Technology Advanced Manufacturing Park



Western New York "STAMP" would be a Science & Technology Advanced Manufacturing Park focusing primarily on design and production industries such as -

- Flat-panel Displays
- Semiconductors
- Micro and Nano-technologies
- Photovoltaics
- High-density Data Centers and more...



What can WNY STAMP do for our community?



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Key Points

- Four town hall meetings were held in the community during 2007. The general public was invited, with meeting invitations appearing in local media outlets.
- The purpose of the meetings was to convey the kind of industry being contemplated. Message: Technology manufacturing is very different from the "smokestack" industries of the past.
- Advanced Manufacturing industries are less likely to offshore operations and jobs vs. commodity manufacturing. This is driven by the desire to keep intellectual property (IP) belonging to the company safe. Because of this, the IP and related high value jobs remain in the US.

Community Survey Results

Western New York Science & Technology Advanced Manufacturing Park

Survey Conducted 11/07/07-12/20/07

- **42%** Response
- **78%** Support Completing STAMP Feasibility Study

Concerns included increased traffic, infrastructure impacts, types of jobs and training, environmental impacts, and impact on rural lifestyle.



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- Survey commissioned to help determine community support for the STAMP effort and gather information on concerns related to growth and economic development.
- Community response was excellent and supportive of continuing STAMP effort to create new employment opportunities with a 42% response level and 78% support level.
- Concerns expressed dealt primarily with potential impacts on existing community and lifestyle such as traffic, environmental impacts and types of jobs. These concerns are similar to those expressed in many communities throughout the US that have experienced changes to their economy and are considering strategies for improvement. Implementing change is complex and must address these issues to get community buy- in which is one impetus for this project.

Feasibility Study Tasks

Western New York Science & Technology Advanced Manufacturing Park

Task 1: SWOT Analysis of Community & Site

Task 2: Site Analysis

Task 3: Target Industry Analysis and Industry Profiles

Task 4: Master Plan Alternatives

Task 5: Cost Analysis

Task 6: Employment & Tax Impact Examples



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- The STAMP Feasibility Study consists of 6 major tasks.